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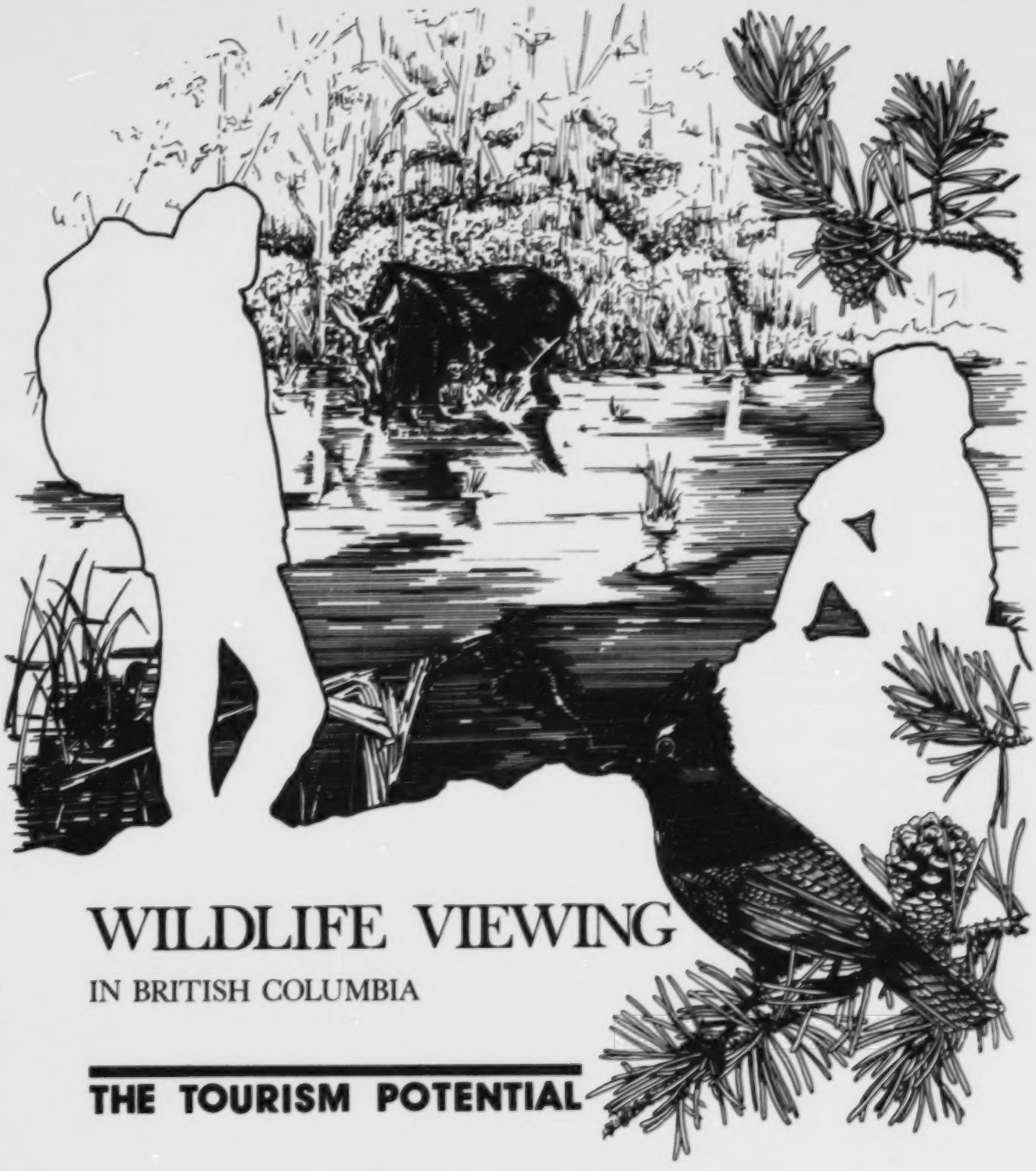

WILDLIFE VIEWING

IN BRITISH COLUMBIA

THE TOURISM POTENTIAL

ECONOMIC & REGIONAL DEVELOPMENT AGREEMENT

Canada

BC

Wildlife Viewing
in
British Columbia

The Tourism Potential

March 1988

Scotland
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The Canada-British Columbia Tourist Industry Development Subsidiary Agreement is one of a series of susidiary agreements under the Economic and Regional Development Agreement (ERDA) signed in November 1984, between the governments of Canada and British Columbia.

The responsibility for the content of this report is the consultants' alone, and the conclusions reached herein, do not necessarily reflect the opinions of those who assisted during the course of this investigation or the federal and provincial governments which funded the study.

Although the study was undertaken in an integrated fashion, each one of its three phases was the prime responsibility of a different firm:

Phase 1: Analysis of products, markets, existing industry and wildlife-viewing experience in other jurisdictions: Ken Youds – Youds Planning Consultants.

Phase 2: Inventory and evaluation of British Columbia's wildlife viewing resource: Gary Runka, Joan Sawicki – Land Sense Ltd. and April Mauer.

Phase 3: Zonation system, development approach, marketing strategy and project coordination: Ric Careless – Ethos Consulting.

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Executive Summary

Wildlife viewing has important implications for tourism in British Columbia. The world over, people are fascinated with seeing wildlife in their natural habitats. This trend is evidenced by the surge in African tourism and by the popularity of whale watching on this province's coast. This study evaluates the importance of British Columbia's wildlife viewing resources, examines the resident and nonresident markets, considers the industry's present condition and its potential, and identifies approaches to development, management and marketing.

British Columbia possesses the greatest diversity of wildlife in Canada, and some of the most spectacular habitats in North America.

To inventory British Columbia's best wildlife viewing opportunities, interviews were conducted province-wide with people knowledgeable about the resource. In total, over 300 sites and areas have been identified and described in a site reference dossier submitted with this report. These were evaluated to determine 51 of the "choice" sites, based on distribution, species diversity, site quality sensitivity, and other factors, from which 25 demonstration sites and tours were selected for a more focused prescriptive statement.

A review of wildlife viewing tourism in other jurisdictions, particularly in Canada and United States, suggests that few are presently pursuing development and marketing. However, interest is growing. Alaska, Oregon and Washington would offer the most competition to British Columbia for similar markets, though each is either further from those markets or possesses less significant wildlife resources. Therefore, British Columbia has a major opportunity, to take a leadership role in wildlife viewing tourism.

From a tourism perspective, wildlife viewing opportunities are products. To define these products, we identified important species and species groupings and divided wildlife viewing opportunities into four zones—urban, front, mid, and backcountry—according to their ability to attract visitors and their environmental resilience. Twenty-seven product types resulted.

Individual products can be packaged by the private and public sectors into destinations, single-day loop tours, multiday road tours, and backcountry tours.

The present and potential markets for these products and packages are tremendous. Wildlife viewing is one of the most popular outdoor activities in Canada and the United States. Each year over 32 million North Americans take a trip from home to view wildlife. In British Columbia, the primary participation markets, including residents and nonresidents, is estimated to be 10.7 million visitor days per year with a potential to grow to 14 million visitor days. Secondary participation is less significant economically, but is still substantial.

To service these markets, the wildlife viewing industry is presently quite small. Of approximately 180 adventure-sector operators that supply incidental nature observation opportunities (for an estimated value of $16.5 million), only 17 can be identified who place a major emphasis on wildlife viewing. These latter companies are presently doing $2.5 million worth of business per year and providing 31,500 user days of service. However, there is excellent potential for this sector to grow.

This report pursues a development approach that emphasizes the importance of maintaining environmental quality and the integrity of wildlife resources while fostering development of the associated tourism sector. In so doing, a range of issues are dealt with:

management of environmental impacts
competing land resource users
land base administration
integration of viewing and consumptive uses of wildlife
operator licensing, tenure and fees
financing of wildlife viewing tourism
education and interpretation
training
safety
roles of the public and private sectors

This discussion is undertaken to provide the background needed for government to formulate wildlife viewing policy. The elements required for such policy are identified. Associated implementation tasks suggest how resource management capability can be achieved. Specifically, the need for a wildlife viewing systems plan is identified.

We then draw together the information on market, products, and resource management and produce prescription summaries for 25 demonstration sites and tours.

It is not enough to simply develop wildlife viewing opportunities. They must also be marketed effectively if this tourism sector is to grow. Accordingly, the final chapter of the report identifies a general wildlife viewing tourism marketing strategy as well as an initial marketing campaign. Both stress the need for action.

RECOMMENDATIONS

The following recommendations are made in order to best develop the potential of British Columbia's wildlife viewing resource:

1. Wildlife-viewing tourism must be developed in a fashion that generates economic benefits while also protecting environmental values.

2. Policy on wildlife viewing management needs to be formulated and adopted by government. The Wildlife Branch should prepare a policy paper based on the information provided in this report as well as further information acquired from the commercial sector and key citizens groups and individuals.

3. To implement this policy, government must establish the capability to manage wildlife viewing tourism to ensure that the quality of the resource will be retained while the potential of the sector is developed. This implies provision of adequate budget and staffing as well as the development and delivery of appropriate regulations and programs.

4. A wildlife viewing systems plan should be prepared to ensure that economic development and environmental protection objectives will be simultaneously achieved.

5. Public and private sector roles should be defined so that the emphasis in government is on resource management, commercial sector support, and generic marketing; and the emphasis in the private sector is on development, delivery, and marketing of specific wildlife viewing packages.

6. To assist in financing new commercial wildlife viewing operations, the minimum funding threshold under the ERDA Tourism Subagreement should be reduced to $20,000.

7. The site information associated with the inventory process, particularly for the choice 51 and other sites proposed for development, should be further detailed and field verified.

8. The Wildlife Branch should undertake detailed environmental research on site sensitivity, site carrying capacity and techniques for managing wildlife viewing impacts.

9. The activities of other land-based users (e.g. forestry, mining) should be administered by government to ensure that important wildlife viewing values are not eroded.

10. The Wildlife Branch should use the Wildlife Management Area status to manage lands associated with especially important wildlife viewing sites.

11. The requirements for, and the policy associated with, wildlife viewing and consumptive wildlife use should be integrated.

12. Government should develop a system for licensing commercial wildlife viewing operators. This should address such issues as residency requirements, fees, tenure, and the role of existing operators.

13. Government and the private sector should develop and implement techniques to ensure the safety of wildlife viewers.

14. Educational and information materials, including brochures, signs, naturalist programs, and interpretive centres, should be developed to enhance the quality of British Columbia's wildlife viewing products.

15. The proposed initial wildlife viewing tourism marketing campaign should be implemented.

16. Further research should be undertaken to provide in-depth detail on wildlife viewing market segments.

CONCLUSIONS

British Columbia's wildlife viewing resource is exceptional. Given the species diversity, numbers of animals, seasonal availability, habitat range, and associated spectacular scenic and wilderness values, it is the best this continent has to offer. The potential market interest in this resource is tremendous. So, if products can be developed in a dynamic, yet environmentally responsible fashion, this province can enjoy a leadership position in the burgeoning wildlife viewing tourism sector.

Chapter 1

Background

Wildlife viewing is becoming a remarkably popular recreational pastime. However, to date the significance of this activity has been poorly appreciated. To better grasp its magnitude, it is useful to compare it with the more widely recognized wildlife hunting sector.

Studies indicate that wildlife viewing is of rapidly increasing popularity, especially among urban and relatively affluent populations. For instance, in the United States, the number of Americans (over 15 years) who participated in wildlife viewing as the primary purpose of an activity increased from 83.2 million to 109.7 million. By comparison, the number of hunters (over 15 years) declined from 17.4 million in 1980 to 16.7 million in 1985 (U.S. Fish and Wildlife Service, 1982 and 1987).

Canadian data indicate that about 20% of the population undertake trips for the primary purpose of observing wildlife; by contrast about 10% participate in hunting (Filion *et al.*, 1983). In addition to primary wildlife viewing trips, about 44% of Canadians participate in nonhunting, wildlife-related activities during trips for other purposes (Filion *et al.*, 1983).

While wildlife viewing is only one motivation for travel, it is particularly significant in regions where extensive and intriguing natural environments remain, such as Kenya, Tanzania, Brazil, Australia, U.S. and Canada. Indeed, studies show that the opportunity to view wildlife is a major motivation for travel to Canada and particularly to British Columbia. A recent survey shows that the exceptional opportunities this province provides for viewing wildlife and enjoying the outdoors in general are among its primary attractions.

The potential worth of this resource to British Columbia's economy is staggering; but, to date, it has received relatively little attention. Recognizing the need to correct this situation, the British Columbia Ministry of Tourism, Recreation and Culture and the Wildlife Branch of the B.C. Ministry of Environment and Parks jointly sponsored this study to attain the background information needed to define policies and delineate approaches to development and marketing. The Federation of B.C. Naturalists contributed to the direction of the study.

Specifically, our Terms of Reference required that we–

- inventory wildlife viewing resources in British Columbia
- identify characteristics, existing levels of activity, and current trends in wildlife viewing
- identify the market demand, and explore the potential for site and facility development and tour packages based on wildlife viewing
- review experiences and trends in other jurisdictions related to wildlife viewing
- delineate a development and marketing approach to wildlife viewing tourism in British Columbia.

While the report's primary audience is government, we expect it will provide useful information to nongovernment organizations concerned with wildlife preservation, use and management; guides, outfitters and others currently involved in providing service within the outdoor recreational industry; as well as the interested general public.

Due to contract requirements, this report and its database were produced in only seven weeks. This necessarily imposed constraints on the level and depth of analysis. Nonetheless, the information attained provides a useful starting point. Additional inventories, research, and analysis can be done as policy choices are made and as development and marketing plans are delineated.

The next chapter of this report describes the wildlife viewing resource; Chapter 3 describes experiences and trends in other jurisdictions; Chapter 4 describes wildlife viewing products and markets; Chapter 5 deals with development and management issues, and lays out the next steps to be taken; Chapter 6 describes a general approach to the marketing of wildlife viewing.

Chapter 2

Wildlife Viewing Resource

RESOURCE DESCRIPTION

British Columbia has the most diverse bird and mammal fauna found anywhere in Canada*. Of the 409 bird species known to breed in Canada, 288 (70%) can be found in British Columbia during all or part of the year. Manitoba is second with 263 species (64%), and Ontario is third with 262 species (64%). (These figures include birds that breed and winter in each province and birds that only breed in each province.)

Of the 163 mammal species known to breed in Canada, 117 (72%) can be found in British Columbia. Whales, dolphins and porpoises are excluded from these numbers because their mobility makes range estimates difficult; but seals, sea-lions and walruses are included.

Although comparison data for amphibian, reptile and fish species are not available for all of Canada, Orchard (1984) reports that 19 amphibian species and 11 reptile species are known to reside in British Columbia. Of the numerous fresh and saltwater fish species present in British Columbia, only the salmon, steelhead, and other salmonid species provide viewing opportunities, but these are probably the most spectacular in Canada (Johnston, 1986).

Besides having the greatest diversity of wildlife species in Canada, British Columbia also has the greatest number of bird and mammal species living exclusively in one province or territory (Maurer, 1985). Sixty-five of Canada's 409 breeding bird species are found only in one Canadian province or territory. Of these 65 species, 35 (54%) occur only in British Columbia. The Northwest Territories is second with 15 species (23%), and Ontario is third with 14 species (21.5%).

Of the 163 mammal species, 37 are found in only one province or territory. Of these, 28 (76%) are found only in British Columbia. Ontario is second with 6 species (16%), while Saskatchewan, Manitoba and the Northwest Territories are tied for third with 1 species (3%) each.

The diversity and uniqueness of our wildlife resources is greatly influenced by the diversity of landforms and climates. British Columbia contains the full range of habitats, including marine, estuary, wetland, fresh water, grassland, alpine, desert and numerous forest types.

Diversity comparisons can also be made with other jurisdictions in North America. Species diversity in British Columbia is greater than that found in Alaska. For example, Alaska has 281 regularly occurring bird species (Quinlan *et al.*, 1983), British Columbia has 310. (These figures include birds that breed and winter, birds that winter only and birds that breed only.) Alaska is home to 77 regularly occurring mammal species (Quinlan *et al.*, 1983); British Columbia has 117. Alaska has 5 amphibian species and 0 reptile species (Taylor, 1979); British Columbia has 19 amphibian and 11 reptile species (Orchard, 1984).

From the perspective of wildlife viewing tourism, wildlife diversity on a year-round basis is important. And, since many species migrate or hibernate, it is important to examine diversity during nonbreeding seasons.

The data show that during these seasons, 176 bird species can be found in British Columbia. Ontario is a distant second with 113 species, and Nova Scotia is third with 94 species. (These figures include the birds that breed and winter and the birds that winter only.)

Many of Canada's mammal species hibernate and therefore are unavailable for viewing. However, almost the full range of Canada's hooved mammals are found in British Columbia, and are most visible during the

* Unless otherwise stated all data in this section comes from Bunnell and Williams (1980).

winter months when they are low in the valleys and along major travel routes. British Columbia's mild climate makes it possible to view these wildlife species at this time.

In addition to British Columbia's diverse and unique wildlife, many species are present in exceptional abundance. On a world wide scale, British Columbia has 60% of the Barrow's goldeneye, 50% of the trumpeter swans, 50% of the blue grouse, 25% of the bald eagles and 20% of the harlequin ducks (British Columbia, 1988). With respect to mammal species, British Columbia has 100% of the Vancouver Island marmots, 75% of the Stone sheep, 65% of the California bighorn sheep, 60% of the mountain goats and 25% of the grizzly bears (British Columbia, 1988). Most importantly, for the purposes of this study, all of the above species can be easily viewed in British Columbia.

ADMINISTRATION AND PRESENT SITE USE

The lands in British Columbia that contain wildlife viewing opportunities fall under four types of ownerships or administrative and management jurisdictions. The first category includes land owned by individuals or corporations, and Indian Reserve land. (For a few parcels of private land with viewing opportunities, management responsibility has been transferred to various non-government or government agencies.)

The second category includes land owned by agencies such as British Columbia Waterfowl Society, North Okanagan Naturalists Club, the Nature Trust of British Columbia, and Ducks Unlimited Canada. The Nature Trust purchases land and leases management authority to others, usually B.C. Ministry of Environment and Parks. Ducks Unlimited Canada pu little land, but is heavily involved in enhancing the habitat of lands held by others.

The third category includes lands managed by B.C. Ministry of Environment and Parks Wildlife Management Branch (Wildlife management areas), Fisheries Management Branch, or Parks and Outdoor Recreation Division (provincial parks, provincial recreation areas). Some of these lands are privately owned or owned by other crown agencies, with agreements in place that transfer management responsibility to B.C. Ministry of Environment and Parks.

The last category includes lands over which other government agencies have tenure, jurisdiction or management responsibilities. These agencies include B.C. Ministry of Transportation and Highways, B.C. Ministry of Forests and Lands (provincial forests, ecological reserves), B.C. Development Corporation, B.C. Hydro, Canadian Department of National Defense, Canadian Wildlife Service (national wildlife areas, migratory bird sanctuaries), Environment Canada (national parks, national park reserves), Fisheries and Oceans Canada, Pacific Salmon Commission, and National Harbours Board. This category also includes land administered by municipal and regional governments.

Current level of use varies depending on the site and its profile in the local community, within British Columbia, and outside the province. McGuire Lake in Salmon Arm is an example of a site promoted locally and used primarily by local residents. But, the George C. Reifel Migratory Bird Sanctuary attracts visitors from inside and outside British Columbia.

Visitor numbers are available for only a few sites. Approximately 70,000 to 100,000 visits are made annually to the George C. Reifel Migratory Bird Sanctuary (Ireland, 1988), which is operated by the British Columbia Waterfowl Society. Facilities provided at this site include parking, a picnicking area, washrooms, trails and currently one metal bird tower and four covered blinds. The Society also organizes special events, such as the Snow Goose Festival co-sponsored by the Canadian Wildlife Service. In 1987 this festival drew an estimated 4,000 people over one weekend (Ireland, 1988).

Creston Valley Migratory Bird Sanctuary, administered by the Creston Valley Wildlife Management Authority, also keeps records but only during the months that the Interpretive Centre is open. The number of recorded visits

from 1983 to 1987 are shown in the following table (Purdy, 1987).

Year	# Of Visitors	# Of Days Centre Open
1983	33,000	365
1984	22,500	365
1985	13,484	160
1986	15,660	141
1987	12,993	117

Visitor numbers are also available for the Adams River sockeye salmon run in the Roderick Haig-Brown Conservation Area, which is managed by Parks and Outdoor Recreation Division of the Ministry of Environment and Parks. For the last three major runs in 1978, 1982 and 1986, visitors were estimated at 112,644, 150,640 and 186,145, respectively (Johnston, 1986; Howie, 1988). Parking, washroom facilities, trails and viewing platforms are available. During the Salute to the Salmon Festival, guided walks led by park interpreters, audio-visual shows, printed material, exhibits, and displays are featured.

Goldstream Provincial Park also promotes opportunities to view spawning salmon. The estimated number of visitor days during 1975, 1980 and 1985, are 119,714, 204,558 and 79,960 respectively (Johnston, 1986).

WILDLIFE VIEWING ZONES

B.C. Ministry of Tourism, Recreation and Culture recently developed a mapping system for the tourism resource based on geographical zones (Careless, 1987). Each of the four zones – urban, frontcountry, midcountry and backcountry– is defined by its accessibility, environmental sensitivity, and its ability to attract and accommodate large numbers of visitors (See Map 1).

These geographical tourism zones have been incorporated into this study as wildlife viewing zones and are important to a number of topics, including the selection of demonstration sites, the establishment of product types, the identification of market segments, product packaging, and resource and environmental management prescriptions.

Urban Zone

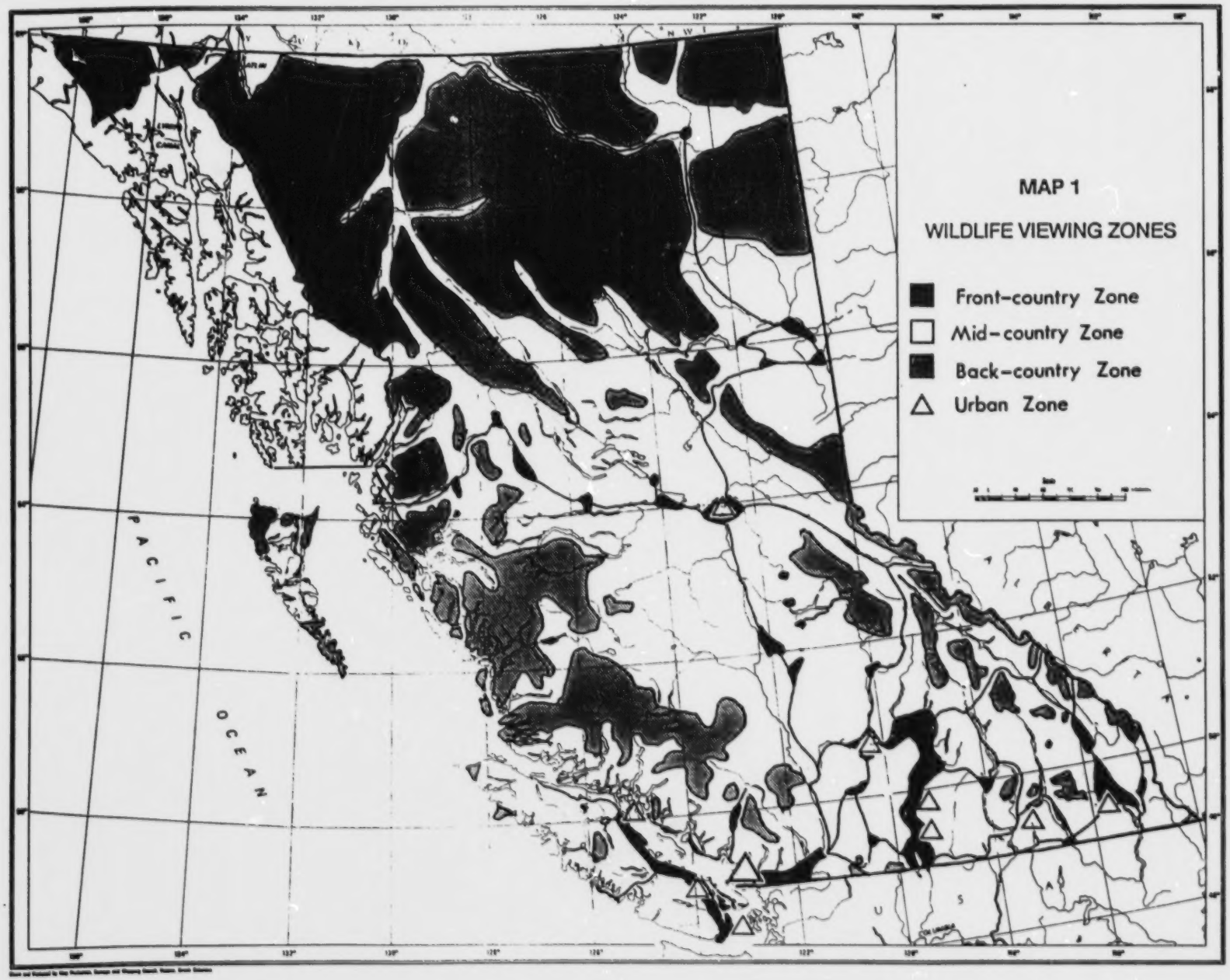
The urban wildlife viewing zone comprises urban centres in British Columbia such as Vancouver, Victoria, Prince George, Kamloops and Kelowna. Typically, urban-based wildlife viewing takes place around personal residences or in open areas within urban communities and as such, does not depend on the provincial land base. Although some urban wildlife viewing opportunities of regional significance were identified during the inventory interview process and recorded on the reference map (for example, Cottonwood Island Park in Prince George), in general, this study does not consider the urban wildlife viewing zone.

Frontcountry Zone

The frontcountry zone is characterized by excellent access, close proximity to populated areas, and general ability to attract and accommodate large numbers of tourists.

This zone comprises the settled regions of the province, specifically southern and coastal areas and the major highway corridors connecting these areas. Wildlife viewing in the frontcountry are often in naturally scenic, though often human-altered environments, and tied to motorized, high-volume transportation routes (automobiles, recreation vehicles, tour buses).

Frontcountry sites will tend to be used intensively, though per person expenditures will usually be lower than in the mid and backcountry. Nevertheless, the large volume of potential visitors will generate sizeable revenues, which will make higher investments in facilities more affordable. Given the linkage between wildlife viewing in this zone and the general tourism infrastructure (e.g. hotels, restaurants, airports), the indirect economic


MAP 1
WILDLIFE VIEWING ZONES
Front-country Zone
Mid-country Zone
Back-country Zone
Urban Zone
PACIFIC
OCEAN

benefits from frontcountry wildlife viewing will be substantial.

Proximity to urban populations allows frontcountry facilities to enjoy longer, sometimes year-round, operation. The wildlife resource itself also facilitates year-round operations as big game species and waterfowl concentrate in the valley bottoms and southern coastal frontcountry zones to overwinter.

This zone is also used by waterfowl for migration stops and nesting, by fish for spawning, and by the birds that prey on the spawned-out fish. In general, ecological productivity of the more climatically favourable frontcountry sites is higher than other zones, providing more intense wildlife use and more reliable viewing opportunities.

Midcountry Zone

Wildlife viewing in the midcountry zone generally takes place in a natural wildland environment.

This zone comprises the B.C. hinterland, especially in southern and central regions, where forest and mining resource development has created access. Typically, the quality of access is poorer than in the frontcountry, with gravel roads —even 4 wheel drive tracks —instead of paved highways. Motorized transport is still a feature of this zone, but it is generally low-volume and more expensive than in the frontcountry.

Given the greater distance and poorer access, wildlife viewing in the midcountry requires more expenditures of time and money than in the frontcountry. As a result, fewer people use this zone. Developed facilities tend to be smaller and less luxurious than in the frontcountry, for example, lodges and resorts instead of hotels. Economics often require that these facilities be multipurposed. For example, a guide or outfitter's camp may be used as a base for hunting in the spring and fall, and for wildlife viewing in the summer.

Given the combination of relative remoteness and more difficult access, the midcountry offers the best grizzly bear viewing opportunity, for example, Meziadin Lake and Atnarko River. It also offers good montane wildlife and sea mammal viewing opportunities. Waterfowl viewing is poorer than in the frontcountry, since wetlands are often at higher elevations or at more northerly latitudes. For the same reasons, the midcountry does not offer the same extent or quality of winter wildlife as the frontcountry. As a result, the viewing season in this zone is considerably shorter.

In general, while midcountry viewing opportunities will be good, they will often not be as good as those in the frontcountry zone, where a more favourable climate enables prolonged and often more reliable viewing, or in the backcountry zone where species thrive in wilderness habitats, away from impacts of resource extraction.

Backcountry Zone

The backcountry zone comprises those areas that have not been substantially altered by human activity. In the south, the backcountry zone is confined to the larger park and wilderness reserves and to the least accessible portions of the Coast Mountains. In the north, this zone is more extensive, though as elsewhere, it is rapidly shrinking as resource extraction activities advance. Absence of motorized vehicles and minimal infrastructure are features of this zone. Wildlife viewing is pursued using simple means (foot, horse, canoe or sea kayak), although air transport is often required to access the zone initially. Travel in this zone generally requires the services of a guide or outfitter. Accommodation is limited to rustic cabins or tent camps.

The opportunity to view such wilderness wildlife is becoming increasingly limited since most regions of the world have lost their wilderness. Few countries can offer clients the chance to view sizable and diverse wildlife populations in the quality natural settings that British Columbia can. As a result, though the number of people engaging in backcountry wildlife viewing is small, potential customers

are often prepared to pay well for this experience.

Wildlife viewing in the backcountry focuses on montane wildlife, which are often present in concentrations and diversities not found in the front and midcountry zones. Healthy predator populations are also a feature of the backcountry zone. Quality sea mammal sites occur in certain northern coastal areas. Bird populations are generally less significant in the backcountry than the frontcountry because remaining wilderness areas, being located at high altitudes or in the north, do not provide as productive habitat.

Of all the zones, the viewing season is the shortest in the backcountry, usually occurring from late spring to early fall. In winter, many species migrate to the lower, warmer climates of the mid and especially frontcountry zones.

POTENTIAL ENVIRONMENTAL IMPACTS

Wildlife viewing is often referred to in literature as nonconsumptive wildlife use. To the extent that participation in the viewing activity is not intended to result in the death of animals, it is nonconsumptive. But viewing can still affect the wildlife resource. In fact, without careful management, impacts can be severe and to the long-term detriment of animal populations. The nature of these impacts are given below. To acknowledge these potential impacts, this report uses the term *wildlife viewing* rather than nonconsumptive wildlife use.

Environmental impact from wildlife viewing can result from the following:

1. Overuse

   The resilience of wild animals to human viewing varies with species and frequency of visits. Some animals such as caribou may spook and disperse from a traditional habitat for long periods if they are approached, while other animals, such as mule deer are much more tolerant of human contact. For some species, an occasional viewing, even by a sizable viewing group, may be tolerable, while repeated visits may not.

   Overuse can also result in physical degradation to the site. Alpine areas, for example, are especially sensitive to horse and foot traffic and most certainly to any off-road vehicle traffic.

2. Viewing During Sensitive Season

   Some animals are more vulnerable to viewing pressures at certain times of the year. With birds, for example, close viewing during nesting can cause mortality in the young. Similarly, wintering ungulates can be especially vulnerable to approach by people. The energy an animal expends from the stress of being approached or from running away can be life threatening, particularly if the animal is approached repeatedly over a hard winter.

3. Choice of Access

   Animals may feel more threatened by being approached on foot or by aircraft than by being viewed from a car. On the other hand, construction of roads for wildlife viewing can degrade wildlife habitat and lead to animal kills through collisions with vehicles.

4. Development of Facilities

   The development of facilities related to wildlife viewing may destroy important habitat and wilderness values. (This occurred recently at Vaseux Lake when a viewing site parking lot was built on a portion of important passerine bird habitat). The development of facilities can also promote overuse of sensitive sites by attracting much higher levels of visitation than would otherwise occur.

5. Animal Harassment

   An animal can become harassed if it is approached too closely or too frequently. While there are unfortunately instances of deliberate harassment, usually it is

unintentional, due to visitors being unaware of the animal's sensitivity or desiring just a little better photograph. Apart from the stress to the animal, harassment also increases the risk that the animal will attack.

6. Increased Poaching

   The relationship between poaching and wildlife viewing is unclear. The identification of key wildlife viewing opportunities can result in sites being used for poaching. (Examples have been recorded in the Chilcotin where shotgun shells have been found on viewing platforms.) On the other hand, the increased tourist activity at viewing sites can deter poaching.

To date, environmental impacts have generally been minimal. This is probably due to the fact that wildlife viewing is currently a small part of the tourist industry and current operators are involved in the business partly for the lifestyle, the love of the outdoors and wildlife, and the opportunity to show visitors a quality, natural experience.

However, this situation could change radically as wildlife viewing becomes a more important part of the tourist industry. The potential for expansion can be expected to present operators with some difficult choices. For example, they may have to choose to reject jet plane loads of international visitors so as not to degrade the environment within their guiding area. In many cases, capitalizing on prime business opportunities will depend on upgrading accommodation (lodge, restaurant, flush toilets, etc.) which in wilderness areas will cause impacts. Even if clients accept appropriately developed facilities and request relatively low-impact access modes, such as pack horses, irreparable environmental damage can still occur if economies of scale dictate group sizes beyond the tolerance of the habitat or the animal populations.

Frontcountry sites are already generally accessible by good-quality roads. Since many locations are situated by the side of highways, animals have already often adapted, to some degree, to contact with people. Nevertheless, development of sites in this zone will greatly intensify the level of animal-human encounter and will increase the number of people approaching wildlife on foot. While generally more resilient than mid and backcountry zones, some frontcountry sites will be sensitive, perhaps even too sensitive to permit tourist viewing activity.

Midcountry sites are likely the easiest to manage for environmental integrity. These sites will generally not experience the high viewer traffic of frontcountry sites nor are they as environmentally sensitive as the backcountry.

The backcountry zone is generally the most environmentally sensitive and the high-quality wilderness experience that draws visitors from around the world can be lost quickly from over or inappropriate use.

INVENTORY OF WILDLIFE VIEWING SITES

None of the inventories already done on wildlife or tourism provided the information needed to assess the tourism opportunity in wildlife viewing. Hence, an inventory on wildlife viewing was conducted for this study using rapid interview techniques. This allowed us to acquire the information needed to provide a background for marketing and development strategies.

Professionals and others with local and regional knowledge of wildlife viewing opportunities were the only practical and quick sources of information. A contact list was drawn up containing a cross section of individuals perceived to have valuable and diverse perspectives on wildlife viewing sites and areas across the province. This contact list included habitat and wildlife biologists of Wildlife Branch, Ministry of Environment and Parks, resource officers of Parks and Outdoor Recreation Division, Ministry of Environment and Parks, representatives from The Federation of B.C. Naturalists, B.C. Wildlife Federation, Guides and Outfitters Association of B.C. and other commercial operators. (See Appendix A.)

Those interviewed were asked to identify the best wildlife viewing opportunities and to answer questions on such aspects as viewing species, viewing season, special viewing characteristics, site/species sensitivity, existing access, and facilities, including educational programs and management considerations. Information was recorded on standardized inventory forms. (See Appendix B for a sample.)

In many cases, more than one individual or group identified the same site or area and provided information from different perspectives.

Given the limited time available, the detail provided on the site and area information sheets varies widely. While there was not time to field-verify information received or to do any additional research, the inventory is considered a valuable resource and likely includes most of the sites in British Columbia with significant wildlife viewing opportunity.

Over 300 sites were identified and plotted. (See Map 2.)* All biogeoclimatic subzones and a significant range of habitat types are represented.

The sites identified by the individuals interviewed range from those providing the opportunity to view one unique species over a short viewing season to those providing the opportunity to view a wide variety of species over a long viewing season.

While some sites may be of lesser significance from a provincial perspective, they may be important locally or regionally for educational or economic development reasons.

Many sites have special viewing characteristics that are unique (for example, Pink Mountain, where all grouse species and ptarmigan species in British Columbia are viewable along the same road, and Hanna Tintina where grizzlies can be viewed from the highway).

Many sites suitable for wildlife viewing also have other attractive natural features such as vegetation (specifically wildflowers), landforms, water bodies, and foreshores. Others have archaeological and historical features.

* Original 1:600,000 maps and accompanying inventory forms are retained by Habitat Management, Wildlife Branch, Ministry of Environment and Parks.

The 51 Choice Wildlife Viewing Sites

The following criteria were used to identify 51 "choice" sites with outstanding attributes for wildlife viewing.

1. The opportunity to view a variety of species (species diversity). Representation of species across the province was also considered important.

2. The opportunity to view large numbers of wildlife, such as large flocks of snow geese or herds of elk, was considered relatively important (numbers of animals).

3. The potential for viewing a unique species, for example, pelicans (distinctiveness).

4. The ability to view a species on a regular basis during the identified season (reliability).

5. The opportunity for wildlife viewing year-round over a long season (seasonality). The opportunity to see at least one of the identified species at a specific time of year was also considered important (for example, salmon spawning at Adams River).

6. The sensitivity of the site and the species (environmental sensitivity). Although difficult to assess given the inventory technique and lack of biophysical information, judgements were made about relative site or species sensitivity. More sensitive sites received less consideration than equivalent resilient ones and exceptionally sensitive sites were not included among the 51 choice sites.

7. The representativeness of tenure, jurisdiction and management. It was considered advantageous to represent a range of tenure and management options across the province.

8. The existence of secondary features such as distinct landforms, bedrock geology,

vegetation, general scenic quality or fishing opportunity (secondary features).

9. The presence of existing educational or interpretive facilities.

Table 1 summarizes the inventory data for the 51 choice wildlife viewing sites. Map 3 indicates the general location of each of these sites.

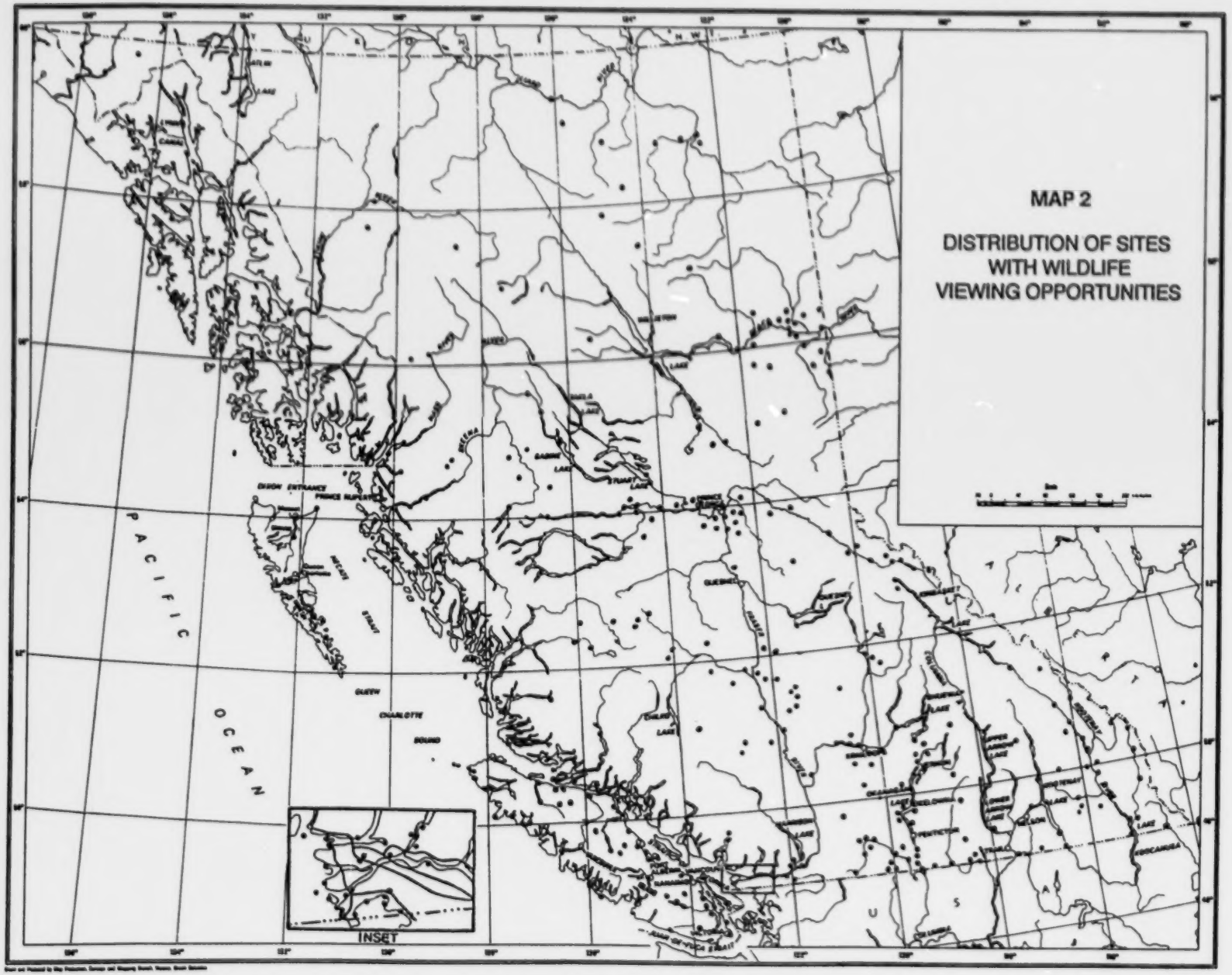

MAP 2
DISTRIBUTION OF SITES
WITH WILDLIFE
VIEWING OPPORTUNITIES
PACIFIC
OCEAN
INSET

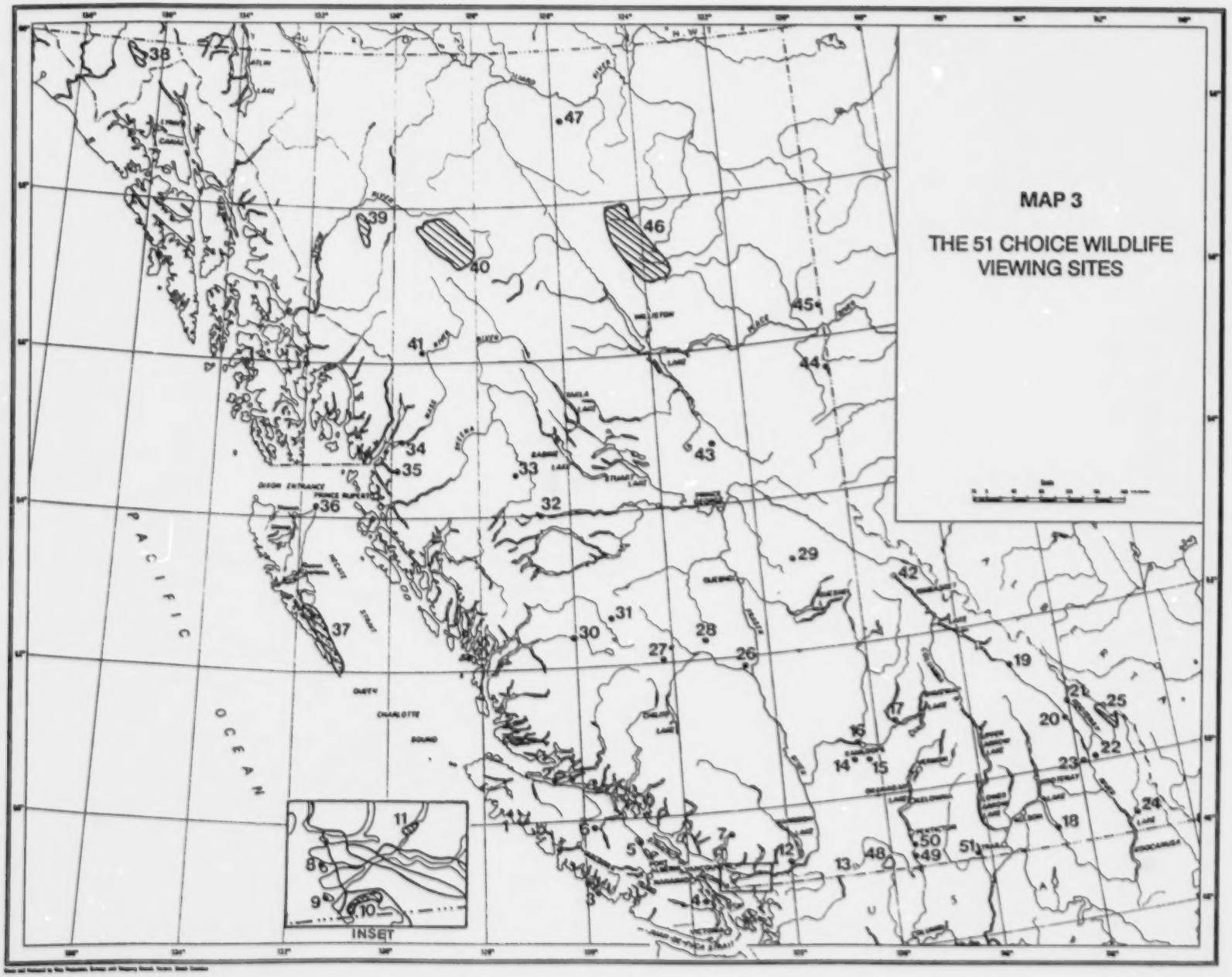
Table 1: The 51 Choice Wildlife Viewing Sites: Sum

Site Number[2]	Site Name	Location: Wildlife Region	Mapsheet[3]	Unit Number[3]	Wildlife Group[4]: Large Mammals: Bear	Moose	Deer	Elk	Caribou	Sheep	Goat	Wolf/Coyote	Small Mamm.: Beav/Musk/Otter	Marmot/Squirrel	Linx/Mink/Fox	Sea Mammals: Whale	Sea Lion	Porpoise	Seal	Birds: Sea	Waterfowl	Shore/Gull/Tern	Crane/Pelic/Heron	Owl	Raptor	Game	Song	Amphibian	Reptile	Fish	Vie: January	February	March	April
1	Bunsby Islands	1	SW	7									•						•	•											•	•	•	•
2	Blackfish Sound	1	SW	10												•			•															
3	Pacific Rim Nat. Park	1	SW	22												•	•		•						•									
4	Somenos Lake	1	SW	37																	•	•					•				•	•	•	•
5	Courtenay R. Estuary	1	SW	297																		•	•		•						•	•	•	
6	Elk River	1	SW	299			•	•														•	•			•					•	•	•	
7	Squamish Estuary	2	SW	46															•		•	•	•	•	•	•	•				•	•	•	•
8	Sea/Iona Islands	2	SW	50																	•	•	•	•	•	•	•				•	•	•	•
9	Reifel Mig. Bird Sanct.	2	SW	53																	•	•	•	•	•	•	•				•	•	•	•
10	Boundary Bay	2	SW	59																		•	•		•						•	•	•	
		2	SW	60																		•	•			•					•	•	•	
		2	SW	61																		•	•								•	•	•	
		2	SW	62																		•	•				•				•	•	•	
11	Pitt-Addington	2	SW	70																•		•	•		•				•		•	•	•	
		2	SW	71																		•	•		•						•	•	•	
		2	SW	72																		•	•		•						•	•	•	
12	Harrison River	2	SE	88																		•	•								•	•	•	
13	Manning Park	2	SE	91										•									•											
		2	SE	92										•																				
		2	SE	93										•																				
		2	SE	94										•																				
14	Meadow Creek	3	SE	100		•																									•	•		
15	Chapperon Lake	3	SE	102																		•			•		•							
16	Tranquille	3	SE	105			•			•																				•	•			•
		3	SE	106																		•	•		•		•				•	•	•	•
17	Adams River	3	SE	110																		•				•	•				•	•		
18	Creston	4	SE	117		•	•	•					•									•				•	•				•			
19	Moberly Marsh	4	SE	122		•	•					•	•									•	•			•	•							•
20	Wilmer Slough	4	SE	124			•	•		•												•	•			•								•
21	Kootenay Nat. Park	4	SE	125		•		•		•	•	•										•			•						•	•	•	
22	Premier Ridge	4	SE	129			•	•	•			•																			•	•	•	
23	Skookumchuck Prairie	4	SE	130			•	•																										
24	Wigwam Flats	4	SE	137		•	•	•		•		•		•												•					•	•	•	•
25	Height of the Rockies	4	SE	142	•	•	•	•		•	•	•																			•	•	•	
26	Junction	5	SW	85			•			•		•			•							•				•	•				•	•	•	
27	Chilanko Marsh	5	EC	187		•	•					•	•		•							•					•				•	•	•	
28	Stum Lake	5	EC	190																		•	•				•							
29	Bowron Slough	5	EC	194	•	•							•																					
30	Atnarko River	5	WC	243	•																					•					•			
31	Ilgachuz	5	WC	246	•				•	•		•														•					•			
32	Nadina River	6	WC	247		•						•																				•	•	•
33	Telkwa Mts.	6	WC	250					•		•																					•	•	
34	Nass River	6	WC	257												•	•		•				•			•					•			•
35	Khutzeymateen	6	WC	260	•						•											•				•					•			
36	Rose Spit	6	WC	261			•														•	•				•					•	•	•	•
37	South Moresby	6	WC	265																•	•	•	•	•	•	•								•
		6	WC	266												•	•		•		•	•				•								
		6	WC	267																	•					•								
38	Haines Road	6	NW	275	•	•			•	•													•											
39	Edziza Prov. Park	6	NW	277	•	•			•	•																•	•	•						
40	Spatsizi Plat. Wild. Pk.	6	NW	279	•	•			•	•		•			•											•	•				•	•	•	•
41	Hanna-Tintini	6	NW	281	•																					•	•							
42	Cranberry Marsh	7	EC	200		•							•		•																•			
43	Crooked River	7	EC	231		•							•									•	•			•					•	•	•	•
44	Swan Lake	7	EC	241									•									•					•	•				•	•	•
45	Boundary Lake	7	NE	298	•	•	•					•	•		•							•	•			•	•	•						•
46	Northeast Rockies	7	NE	305	•	•		•	•	•	•	•										•	•			•		•						
47	Muncho Lk. Prov. Park	7	NE	313					•	•																	•							
48	Cathedral Prov Park	8	SE	153						•	•																							
		8	SE	154						•	•			•											•		•	•						
		8	SE	155						•																								
49	Osoyoos Oxbows	8	SE	160																														•
50	Vaseux Lake	8	SE	162			•			•			•									•				•		•	•					
51	Christina Lake	8	SE	185			•			•												•	•	•		•	•	•	•		•	•	•	•

Sites: Summary of Inventory Data[1]

FOOTNOTES:

1 As provided by those interviewed. Site information may not be complete.
2 See Map 3.
3 Referenced to 1:600,000 inventory maps under separate cover.
4 Species reported as regularly viewable. List may not be complete.
5 Indicates months during which at least one identified species is regularly viewable.
6 Indicates whether viewing opportunities are concentrated in one location or dispersed over a larger area.
7 General indicator of most common means (or combination of means) of gaining access to the site (rather than access within the site)." " indicates alternate common means of access, particularly for backcountry sites.


MAP 3
THE 51 CHOICE WILDLIFE VIEWING SITES
PACIFIC
OCEAN
INSET

Chapter 3

Experience Elsewhere

This chapter reviews the approach other jurisdictions are taking to wildlife viewing. Its purpose is to obtain a greater appreciation of trends and competitive thrusts both internationally and in regions of North America. Closest attention is given to jurisdictions in relatively close proximity to B.C.

AN INTERNATIONAL PERSPECTIVE: AFRICA

For a number of African nations, wildlife viewing is the centrepiece of the tourism industry. Kenya established itself as a leader in providing wildlife viewing opportunities for tourists, largely through a close relationship between the national parks and the private sector. Especially in the past decade, visitation has skyrocketed and the range of opportunities for viewing wildlife has been broadened to include luxury hotels, resorts on stilts above the plains, bus tours, and guided hiking tours. Where Kenya has led, several other African nations have followed, including Tanzania, Botswana, Ghana, and others (Eltringham, 1984).

Generally, tourism revenues help governments and park administrations justify management expenditures, especially with regard to controlling poaching and agricultural encroachment. Also, the presence of conservation-oriented visitors, particularly in the more remote backcountry areas, tends to help discourage poachers. Today, an estimated 5,000 outfitters, guide services, and specialty travel agents offer adventure travel packages to a wide array of frontcountry and backcountry areas in Africa. Many of these tours are focussed on opportunities to view wildlife.

An advertisement from Sobek's International Explorers Society, one of the world's leading adventure tour operators, illustrates the private sector's role in popularizing wildlife viewing, and also suggests possible impacts to wildlife:

> MOUNTAIN GORILLAS OF RWANDA
>
> See the mighty masters of Africa's montane forests, the magnificent mountain gorillas of the Virunga volcanoes. In the company of rangers and guides we visit these primates, which are threatened by the encroachment of humankind, yet remain a link to the past...$1920 (U.S.) (Sobek's International Explorers Society, 1986).

The typical pricing for such tours, normally stated as a land cost only (i.e. not including transportation to the start of the tour), ranges from about $1500 (US) to $3500 (US), with costs per day ranging from about $110 to $160 (US). This is a good indication of willingness to pay in the marketplace for such wildlife viewing experiences.

While considerable employment is created through the use of local guides and packers, it has also been observed that the majority of the profits go to non-African companies and that local agrarian economies, which must compete directly with the wildlife for their survival, receive little direct or long-term benefit from the tours for the affluent of the world (Eltringham, 1984). The important lesson here for British Columbia is that local, rural economies must benefit significantly from wildlife viewing tourism in order for conservation of wildlife resources to be valued in relation to competing resource-based activities.

While African and other tropical wildlife populations have been the worldwide focus of conservation interest, other regions of the world are gaining increasing attention. British Columbia, with its diversity and abundance of

relatively undisturbed natural environments, is already attracting notice.

ALASKA

If any region of North America captures imaginations, Alaska is it. Americans consider Alaska their last major frontier, and many have a strong desire to visit it. Alaska's tremendous reserves of dedicated wilderness (38% of the State's area is within parks and related reserves) and certain special wildlife areas have been well publicized. Interest in seeing wildlife is high; 30 to 40% of inquiries to the U.S. Tourism Division relate to wildlife.

Most prominent is the McNeil River Game Sanctuary where numerous (70 to 100) grizzly bears congregate at the McNeil Falls each year to feast on the salmon runs. Here, an unusual opportunity for viewing grizzlies has been devised. There are no facilities other than a simple base camp and a trail to the viewing site. Each day a small group of visitors are guided along the same path at the same time. Gorging themselves on salmon, the bears pay little attention to the visitors. The guides are seasonal employees of the State; the private sector is not involved. The number of visitors is limited to 150 to 200 each year, and these are selected by drawing from applicants.

This visitor control program was instituted primarily to ensure that visitation does not diminish the quality of the site for the bears, as was the case before these measures were implemented. Visitor safety is improved over earlier conditions by avoiding habituating the bears to human food or garbage and by making human presence routine and thus nonthreatening.

Though wildlife viewing is an important tourist generator, the Alaskan government has collected little data on this activity, even on such well-known sites as Round Island and Walrus Island (Hughes, 1988). Public sector investments in viewing tend to be minimal, usually no more than a rustic campsite and possibly a trail. There are as yet few management plans (Hughes, 1988).

Alaska has published an excellent, full-colour guide to viewing wildlife in the State. But, to date, approximately 24,000 copies remain unsold, and the Division of Tourism does not mention this guidebook in its "Vacation Planner" (Vickerman, 1988). Meanwhile the tourism industry seriously promotes wildlife as a focus for visits to the State. One company advertises trips to Katmai and Denali Parks for "close-up encounters with caribou, fox, Dall sheep, moose, and bear" (Vickerman, 1988). Similarly, Glacier Bay is advertised as offering opportunities to see whales, seals, eagles, and goats (Vickerman, 1988). The private sector appears to be taking the lead role in promoting wildlife viewing, while the State is concerned primarily with protecting the resource.

In terms of spectacular wildlife, Alaska is a prime competitor of British Columbia, which is comparatively less known to Americans, but is much more accessible, particularly to residents of the western States.

OREGON

Wildlife viewing and associated tourism has become an issue in Oregon. A variety of state and federal lands offer opportunities to view fish, birds, small mammals, deer, and elk. Most significant are the State sanctuaries and approximately one dozen national wildlife refuges, each of which is promoted by a brochure that encourages wildlife observation and identification.

In 1987, the Oregon Legislature entertained a series of bills aimed at wildlife viewing and tourism, based on a booklet entitled "Oregon's Wildlife and Economic Recovery" (Vickerman, 1988). This booklet featured a plan for fostering the visibility and level of participation in nonconsumptive wildlife recreation, including a significant habitat

acquisition and protection component. While the bills did not pass in 1987, they did stimulate a number of actions:

1. The Department of Fish and Wildlife established task forces to consider nonconsumptive wildlife recreation and appropriate budget allocations.

2. The Department of Fish and Wildlife funded a small publication entitled "Oregon's Watchable Wildlife," which offers information on how to view wild animals and describes viewing sites across the State. None of these sites has required significant capital investment to facilitate viewing.

3. The Transportation Department included several wildlife viewing sites on its highway map.

4. Defenders of Wildlife, a national pro-wildlife group, in cooperation with a number of agencies that supplied financial and in-kind support, is developing a state-wide comprehensive viewing guide, which will include over 100 reasonably accessible wildlife viewing sites in public ownership.

5. The Transportation Department will identify all wildlife viewing sites with appropriate roadside signs.

While capital support is minimal, Oregon clearly plans to highlight wildlife viewing as a tourist opportunity (Vickerman, 1988).

Resource diversity and abundance are considerably lower than in British Columbia, but Oregon is much closer to the California market. So British Columbia must work harder to ensure that visitors driving from California spend as much vacation time as possible in this province; half a day longer spent in Oregon may mean half a day less in British Columbia.

WASHINGTON

The approximately 20 national wildlife refuges play the greatest role in providing wildlife viewing opportunities in the State of Washington. Although these do not emphasize tourism, they are well-known to many Americans. As in Oregon, these refuges primarily offer opportunities to observe birds, small mammals, deer, and occasionally elk.

The State agency responsible for wildlife, Washington Wildlife, doesn't actively foster wildlife viewing; viewing is treated as an incidental activity and occurs without any special facilitation. For example, to keep elk off private lands, Washington Wildlife operate feeding stations during the winter months. It is reportedly a popular pastime for the public to watch the elk at these stations.

The national wildlife refuges in this area attract the attention of Americans travelling by automobile; thus they offer British Columbia some competition. But the State itself offers little competition in wildlife viewing tourism. Indeed, Washington residents can be expected to be an accessible and receptive market for B.C.

WYOMING

Wyoming is one of the few States that has "contemplated linking nonconsumptive wildlife recreation, economic benefits, and conservation goals" (Vickerman, 1988). The Department of Game and Fish, which has coined the slogan "Wyoming's Wildife - Worth the Watching", is promoting nonhunting wildlife recreation, and working with the state's Travel Commission. It is proceeding with designating viewing sites, developing interpretive displays, and publishing promotional materials.

Significantly, the Department of Game and Fish has prepared "A Plan for the Development of Nonconsumptive Use of Wildlife in Wyoming." This plan estimates that such recreation has a present annual economic worth

of $678 million (US) and proposes the goal of increasing nonconsumptive wildlife expenditures to over $1 billion (US) by 1991 (Wyoming, State of, 1986). Much of the plan's thrust is directed toward encouraging highway travellers to pause longer in the State.

Recognizing the strong growth potential for wildlife viewing in resident and nonresident markets, the Game and Fish Department has endorsed the spending of $3.5 million on nongame projects, using revenues predominantly from hunting and fishing licences (Vickerman, 1988). No doubt other states will be watching these initiatives to judge the desirability of starting similar programs. Since the strategy seems to favour holding visitors in Wyoming longer, particularly those travelling by automobile, these projects will compete with British Columbia only to the extent that such travellers may also be destined for this province.

ALBERTA

The wildlife resources of Alberta that receive greatest tourist attention are those of the National Parks. Agriculture dominates much of southern Alberta, and considerably limits wildlife habitat. In the north, the extensive conifer forests make viewing difficult. One important wildlife population is a major attraction: the bison herd contained in a large paddock at Elk Island National Park, east of Edmonton.

Parks Canada recognizes that the opportunity to view wildlife motivates visits to the National Parks, but has collected little data on this use (Beland, 1988). In Jasper and Banff National Parks, many of the sightings of deer, moose, bear, goat, sheep and elk occur in close proximity to the main highways, and other high-use areas, such as campgrounds. No attempts have been made to facilitate this viewing opportunity. The viewing facilities in these parks are often self-guiding trails and viewing sites oriented to nature observation in general. Each of these may represent capital investments of $35,000 to $100,000, and operating costs are minimal.

On the whole, with the exception of its mountainous portion, Alberta does not possess the wildlife resources to be a significant competitor to British Columbia. Banff and Jasper National Parks are well established as international destinations, but their proximity to British Columbia also gives this province access to the market that they attract.

YUKON AND NORTHWEST TERRITORIES

Both these northern jurisdictions recognize that visitors are interested in viewing wildlife. A 1982 survey found that "viewing wildlife" was one of the leading trip motivators (26.4%) and that not seeing wildlife was one of the major sources of trip dissatisfaction (Yukon Dept. of Tourism, 1984). However, no government programs appear to be in place to promote wildlife viewing or to identify the best opportunities. Instead, the private sector and community- based interests take the lead roles. A number of well-established lodges already cater exclusively to the wildlife viewing market; and tours to view polar bears, walruses, and other animals of the Arctic are increasingly available.

The climate and short summer will likely constrain private sector investments in frontcountry infrastructure, but backcountry tours, with opportunities to view various arctic species will continue to grow. In comparison to British Columbia, the Yukon and Northwest Territories are considerably less accessible and have shorter tourist seasons. But, they offer a range of wildlife viewing experiences (in terms of landscapes and species) not found in this province, so they may appeal to people with a professional or strong amateur interest in wildlife.

OTHER CANADIAN PROVINCES

Provincial agencies in other Canadian provinces responsible for wildlife management seem to be taking little interest in encouraging, or managing for, wildlife viewing. New Brunswick has published a guide to wildlife viewing opportunities in that province, but that seems to be the extent of its activity to date. In Churchill, Manitoba polar bears migrate through the town and district, and this has inspired considerable tourism.

In the provincial parks of Ontario, as elsewhere, wildlife is considered an important attraction, but specialized facilities or services related to wildlife viewing are not generally apparent, with the exception of evening "wolf howling" interpretive programs in Algonquin Park. The Government of Ontario also promotes community involvement and volunteerism with respect to habitat enhancement, access, and public awareness of wildlife. The program is based on recognition of the importance to society of wildlife for viewing.

The lack of government attention to wildlife viewing does not imply a lack of public interest. The Canadian Wildlife Service has found that observing wildlife either near home or on outings is one of the most popular outdoor recreational pastimes. More than 15 million Canadians participate annually (Struzik, 1988). In this light, it is especially interesting that few strategic plans or policies have been developed to foster wildlife viewing tourism.

CONCLUSIONS

There is a significant link between parks and other wildlife refuges and the appeal, regionally and globally, of wildlife viewing; a conservation designation adds credibility and gives a focal point to potential visitors.

Many jurisdictions across North America are realizing that wildlife-oriented recreation includes a significant nonhunting component. And some jurisdictions, notably Wyoming and Oregon, are taking progressive positions.

Many states and provinces have yet to define objectives regarding planning for and facilitating wildlife viewing activities. There are only a few formalized programs and little direct funding to enhance viewing opportunities and inform the public. Most jurisdictions tend to rely on noncapital intensive approaches, but this may be due to general government fiscal restraint. At present, there appears to be little coordination between wildlife resource agencies and tourism agencies (Vickerman, 1988).

Chapter 4

Products and Markets

This chapter defines wildlife viewing product types and packages that operators could offer and examines the current and potential markets for those offerings.

The connection between wildlife and tourism necessitates the introduction of terminology not commonly associated with wildlife management. These terms are defined here.

Product. A product is a specific service, object, or opportunity available at a unit price to potential customers. With respect to wildlife viewing, a product is a particular opportunity to view a species or combination of species in a particular context. *A wildlife viewing product is not an animal or animals in isolation but rather animal(s) in association with an environment and the viewer.* Together the animal, its environment, and the viewer's perspective (from a car, from a trail, or via television) define the product. Each combination represents a different product because it appeals to a different market. Categories of products are referred to as product types.

Package. In tourism, a package is a series of products assembled in a logical, integrated fashion and may be available to potential customers at a unit price. An organized tour is a package, as is a stay at a resort that includes various specific products such as accommodation, meals, entertainment, nature tours, and so on. Also, self-guided tours, such as by private automobile of a number of sites, is a type of package. Packaging is an effective technique to increase the attractiveness of individual tourism products, especially since each type of package will appeal to different market segments.

Market. A market is a specific segment of a population, defined by origin and appropriate socio-economic variables, that is inclined to purchase a given product or product type. The phrase "market segment" is used to indicate a more specific component of a broader market.

PRODUCTS

This section discusses the variables used to identify product types, describes the 27 product types identified using these variables, and discusses product packages.

Identification of Product Types

An enormous array of potential wildlife viewing opportunities are available in British Columbia. To develop a systematic tourism strategy, the most appropriate product types need to be identified.

For wildlife viewing tourism, this requires consideration of three variables: (1) the species viewers prefer; (2) the distribution of preferred species across wildlife viewing zones; and (3) the seasonality of tourism and wildlife viewing opportunities:

Preferred Species

Several recent studies have examined preferences for viewing species in North American temperate regions (U.S. F&W Service, 1982; Vickerman, 1988; Filion *et al.*, 1983). But, their conclusions differ and thus are of only limited usefulness. The most relevant analysis is found in the B.C. Wildlife Branch's study of nonhunting and other wildlife activities (Reid *et al.*, 1986). (See Appendix C.) The study only includes residents of British Columbia, and does not distinguish between viewing near home and viewing on wildlife trips. Nonetheless, the data does provide a useful perspective.

To acquire some perspective on which species would have the greatest ability to attract visitors from outside the province, wildlife management professionals, park managers, members of wildlife-oriented public, and industry groups were interviewed. The following list of preferred species and groups of species was compiled. (The sequence does not imply relative significance or preference.)

1. Bears, especially grizzly
2. Raptors, especially bald eagle and peregrine falcons
3. Predators, especially cougar and wolves
4. Waterfowl and shorebirds
5. Songbirds
6. Sea mammals, especially gray whales, sea lions, and killer whales, and other sea life, including sea birds
7. Montane wildlife, featuring mountain goat, mountain sheep (3 species), elk, caribou (2 species), moose and deer
8. Small mammals
9. Fish, especially spawning salmonids

Distribution Across Zones

Each of the three wildlife viewing zones—frontcountry, midcountry, and backcountry—are characterized by varying degrees of wildness and accessibility. Combining these with the nine preferred species groups delineates twenty-seven (3 times 9) wildlife viewing product types.

Wildlife Viewing Seasons

In general, wildlife viewing opportunities exist during most seasons, although the location and nature of the opportunities will vary from season to season.

Traditionally, tourists prefer the summer months. A recent study confirms this:

Spring	34% of all respondents
Summer	74% of all respondents
Fall	33% of all respondents
Winter	20% of all respondents

(Min. of Tourism, Recreation and Culture, 1988)

Consequently, the summer months are very busy for the tourist industry, with facilities in many towns and rural areas being fully booked. But, as summer comes to a close, many operators are faced with relatively low occupancy rates. Therefore, it is often desirable to attract tourists during the nonsummer seasons to improve the profitability of tourism enterprises. Of course, the reverse tends to be true for winter recreational areas.

Wildlife viewing opportunities can enhance tourism throughout all seasons. During the summer months, significant highway-oriented sites (frontcountry) can help attract visitors to areas they might not otherwise visit and can result in an extra half or whole day being spent in a region or within the province. In the midcountry and backcountry zones, wildlife viewing opportunities will attract new destination-oriented visitors. This will be especially important to rural and northern areas, which are not currently prime summertime destinations.

During the spring and fall, wildlife viewing products associated with the frontcountry and the midcountry zones will attract new visitors and lengthen the tourist season. Due to the cooler and wetter climate, these visitors will be less inclined to camp out, and more inclined to use tourist accommodations. During the fall, it will be necessary for resource managers to institute measures that will reduce the potential for conflict between hunters and viewers.

While there are good opportunities to view wildlife during the winter months, adverse environmental conditions deter significant participation. This is even true on the relatively mild southern coast. In the north, large herds of caribou are visible in their winter ranges but access is difficult, the days are short, the

temperatures are low, and the animals can be easily overstressed. One important exception is the East Kootenay region where wintering ungulates can be easily and reliably viewed, without disturbance to the animals. Perhaps in such areas, wildlife viewing could be associated with other winter attractions, but it is unlikely to be a major tourism activity because travellers tend to focus on warmer climates during the winter.

Description of Product Types

This section briefly describes each of the 27 product types. The examples of important specific products (viewing opportunities) have been drawn from the 51 choice viewing sites identified in Table 1 of Chapter 2.

1-F: Bears - Frontcountry:

Examples:	Kootenay Park Road, Manning Provincial Park
Market Appeal:	Usually only black bears; of interest to auto-touring visitors
Seasons:	Late Spring to early Fall

1-M: Bears - Midcountry:

Examples:	Hanna-Tintina and Atnarko River
Market Appeal:	Possible international appeal if these grizzly bear sites are properly developed
Seasons:	Late Summer and early Fall

1-B: Bears - Backcountry:

Example:	Height of the Rockies, Mt. Edziza Provincial Park
Market Appeal:	International appeal when associated with other viewing products of this backcountry area
Seasons:	Summer to early Fall

2-F: Raptors - Frontcountry:

Examples:	Chapperon Lake, Squamish Estuary, Boundary Bay
Market Appeal:	Widespread appeal, especially to Americans
Seasons:	Year round

2-M: Raptors - Midcountry:

Examples:	Nass River and Atnarko River
Market Appeal:	Appealing as part of a series of midcountry experiences or to birders (esp. eagles)
Seasons:	Very time critical, e.g. Nass River is tied to spawning ooligan in Spring; Atnarko River is tied to spawning salmon in early Fall

2-B: Raptors - Backcountry:

Example:	South Moresby
Market Appeal:	International appeal; part of general backcountry natural history experiences
Seasons:	Primarily Summer

3-F: Predators - Frontcountry:

Example:	Nulki Hills (wolf howling)
Market Appeal:	Outdoors-oriented highway travellers
Season:	Late Spring to early Fall

3-M: Predators - Midcountry:

Examples:	Junction (cougar)
Market Appeal:	Viewing opportunities are rare, and experienced trackers are required. Thus, clientele will likely be serious wildlife photographers or adventurers seeking a unique experience
Seasons:	Year round

3-B: Predators - Backcountry:

Example:	Spatsizi Plateau Wilderness Park (wolves)
Market Appeal:	International appeal; highly valued part of general backcountry experience
Seasons:	Primarily Summer

4-F: Waterfowl/Shorebirds - Frontcountry:

Examples:	Creston, Pitt-Addington
Market Appeal:	Primarily birders, resident and nonresident, and tourists with a general interest in the outdoors and willingness to participate in guided tours
Seasons:	Year round

4-M: Waterfowl/Shorebirds - Midcountry:

Example:	Chilanko Marsh
Market Appeal:	Primarily birders, resident and nonresident
Seasons:	April to September

4-B: Waterfowl/Shorebirds - Backcountry:

Example:	Rose Spit
Market Appeal:	International appeal; part of general nature experiences, particularly in coastal backcountry areas
Seasons:	May to August

5-F: Songbirds - Frontcountry:

Examples:	Swan Lake, Tranquille
Market Appeal:	Primarily birders, particularly residents; also people with general outdoors interest, provided interpretation is available
Seasons:	March to October

5-M: Songbirds - Midcountry:

Examples:	Chilanko Marsh, Crooked River
Market Appeal:	Primarily birders
Seasons:	April to September

5-B: Songbirds - Backcountry:

Examples:	Haines Road hinterland
Market Appeal:	Primarily birders on guided backcountry tours
Season:	June to July

6-F: Sea Mammals/etc. - Frontcountry:

Example:	Pacific Rim National Park (Long Beach)
Market Appeal:	Broad cross section of urban-based residents and nonresidents
Seasons:	Late February to mid October

6-M: Sea Mammals/etc. - Midcountry:

Examples:	Robson Bight, Blackfish Sound
Market Appeal:	International appeal; widespread in all market segments
Seasons:	Late June to late August

6-B: Sea Mammals/etc. - Backcountry:

Examples:	South Moresby, Bunsby Islands
Market Appeal:	Strong international appeal; part of marine-oriented backcountry experiences
Seasons:	Primarily Summer

7-F: Montane Wildlife - Frontcountry:

Examples:	Kootenay National Park
Market Appeal:	Auto-touring residents and nonresidents
Seasons:	Year round

7-M: Montane Wildlife - Midcountry:

Example:	Premier Ridge
Market Appeal:	Residents and nonresidents with general outdoor interests
Seasons:	Year round

7-B: Montane Wildlife - Backcountry:

Examples:	Height of the Rockies, Spatsizi Plateau Wilderness Park
Market Appeal:	International; people interested in general natural history and in seeing ungulates such as mountain goat, sheep, caribou, moose
Season:	Year round

8-F: Small Mammals - Frontcountry:

Examples:	Manning Provincial Park
Market Appeal:	Auto-touring residents and nonresidents; often a secondary feature
Seasons:	Spring, Summer and Fall

8-M: Small Mammals - Midcountry:

Examples:	Manning Provincial Park
Market Appeal:	Secondary feature for residents and nonresidents interested in the outdoors
Seasons:	May to September

8-B: Small Mammals - Backcountry:

Examples:	Cathedral Provincial Park (marmots)
Market Appeal:	Important element of general backcountry experiences
Seasons:	May to August

9-F: Fish - Frontcountry:

Example:	Adams River (sockeye run)
Market Appeal:	Residents and nonresidents from a wide cross-section of population
Seasons:	Late August to late October, although each spawning site has a short time-critical season

9-M: Fish - Midcountry:

Examples:	Hanna-Tintina, Atnarko River
Market Appeal:	As a secondary feature, usually in association with viewing grizzly bears
Seasons:	Late August to late October, depending on the year and the particular site

9-B: Fish - Backcountry:

Example:	South Moresby (salmon streams)
Market Appeal:	Secondary feature of general backcountry experience for viewers with a strong interest in natural history
Season:	Fall

Product Packages

The product types described above do not all have the ability on their own to attract visitors; often they need to be combined with other products into *packages.*

Package types can be differentiated on the basis of –

- general access and environmental conditions (i.e. frontcountry, midcountry, or backcountry zones)
- the use of guides

- travel modes (e.g. automobile, hiking, etc.)
- trip duration.

A large number of packages could be created by combining these variables in slightly different ways. But the concern here is to focus on a small number of package types that are most suited to British Columbia. These are:

1. Single-destination trips

   The viewing product is site specific and of such a high calibre and appeal that visitors take single-purpose trips to view it. These are most likely to be found in frontcountry or midcountry zones. Examples include whale watching at Long Beach and birding at Creston.

2. Single-day loops

   A series of viewing products in the frontcountry or midcountry zones can be combined in a self-directed or guided tour that is the primary activity of a day. Participants return to their point of origin, whether home, camp, resort, or hotel. Such tours could be thematic, such as a tour of a number of waterfowl areas, or could be broader in scope, depending upon the market.

3. Multiday road tours

   Unlike single-day loops, multiday tours can constitute a vacation. They cover more viewing products and larger geographic areas; returning to the point of origin is optional. A guided tour may use a variety of travel modes such as bus, plane, and boat. Auto-touring visitors may enjoy such packages on a self-guided basis (with brochures).

4. Backcountry access by plane or boat tour

   Usually these will be multiday trips into remote parts of the coast or interior. Most trips will be guided by commercial operators. Clientel will pay relatively high per day costs and will expect high-quality service and opportunities to view a wide array of wildlife and other elements of the natural environment. When access is by plane, accommodation will usually be in base camps. When access is by boat, accommodation will usually be on board.

5. Backcountry tours by nonmotorized travel modes

   These include all trips where travel depends on physical effort, including backpacking, horsepacking, canoeing, and kayaking. Rafting on remote rivers may also qualify if considerable physical effort is required of the participants. Such trips may be either guided or self-guided, and will involve opportunities to view a wide array of wildlife and other elements of the natural environment. As with other backcountry tours, there is considerable commercial potential for organized tours, with clientel paying relatively high per day prices for high-quality services and experiences.

MARKET ANALYSIS

This section identifies and quantifies market segments appropriate to British Columbia's wildlife viewing products, and projects market potentials.

Market Segments

This analysis is concerned with those for whom wildlife viewing is a primary activity (referred to below as primary participants) or a secondary, incidental activity (referred to below as secondary participants), and with residents and nonresident visitors; it is not concerned with wildlife viewing that occurs close to the viewers' homes. It examines the following four broad market segments:

1. Resident, primary participants

People who take outings from home specifically to view wildlife. These participants have the following characteristics:

- have strong interest in nature observation in general; likely are members of related clubs and subscribers to related magazines.
- have good knowledge of the resource.
- contribute to redistribution of dollars within the province, particularly from urban to rural areas (59% of expenditures are for food, lodging and transportation) (Reid *et al.*, 1986).
- are likely to participate in all package types outlined above.

2. Resident, secondary participants

These participants enjoy viewing wildlife but don't take special viewing trips. In general, they have the following characteristics:

- enjoy seeing wildlife as a secondary feature or attraction during auto touring or general outdoor trips.
- could become interested in wildlife viewing as a primary activity. As opportunities to observe wildlife become more evident, they will consider special trips, such as a whale watching package tour or a trip to Adams River.
- are likely to participate in self-guided, single-day and multiday tour packages.
- have little economic impact, but represent a potential to expand to the primary participation market.

3. Nonresident, primary participants

These participants have the following characteristics:

- are likely to be members of wildlife-oriented or conservation-oriented clubs or associations.
- will come to British Columbia to view wildlife or partake in general nature observation in the frontcountry, midcountry and backcountry zones, provided they are offered quality experiences, both in terms of the natural resource and the level of service.
- can make a significant contribution to the provincial economy; person-day expenditure levels are high and often involve guiding or charter services.
- are likely to be residents of Washington, Oregon, California, northeastern U.S., southern Ontario and Alberta.
- are likely to participate in all five package types, often on a guided basis.

4. Nonresident, secondary participants

These participants have the following characterisitics:

- are interested in auto touring or general outdoor vacations; that is, they are oriented to frontcountry and midcountry opportunities.
- could be stimulated to undertake more frequent or longer visits (an additional half to whole day) by being made aware of additional "things to do and see" in British Columbia.
- are most likely to be residents of the western Canadian provinces or the western United States, especially Washington, Oregon, California, Idaho, and Montana.
- are likely to participate only in self-guided, single or multiday road-tour packages.

Primary participants can be further divided into three types as identified by the Outdoor Recreation Council's recent study of British Columbia's adventure travel industry (Outdoor Recreation Council, 1988):

1. Casual adventurers

   - are experimenting with new and more challenging outdoor activities.
   - are likely to be under 25 or over 45 years of age.
   - need to be persuaded to participate.
   - tend to undertake day and weekend trips, and most likely to be local in origin.
   - are oriented to frontcountry primarily, with willingness to join organized tours to midcountry.

2. Committed adventurers

   - tend to be relatively affluent and well educated, between 30 and 60 years of age, and reside in urban and suburban areas.
   - desire to learn and tend to be increasingly willing to travel further afield, to choose more exotic destinations, and to take on more challenges.
   - are primarily interested in extended backcountry tours.
   - are difficult to attract because they have many other destinations to choose from and British Columbia is commonly perceived as being not sufficiently interesting.
   - can be stimulated to visit an area through land use or environmental controversies (for example, South Moresby, Robson Bight, Khutzeymateen).

3. Expert adventurers

   - have made a serious (amateur or professional) commitment to a particular sport or outdoor interest, such as wildlife observation or natural history in general.
   - tend to be members of, and subscribers to, specialized outdoors clubs and magazines.
   - are primarily interested in extended backcountry tours.
   - are relatively easier to attract than the "committed adventurer" through their clubs, magazines, and other specialized media.

Market Projections

We have estimated the sizes of the major market segments that might be interested in participating, now and in the future, in wildlife viewing tourism in British Columbia. Market size includes the total population *willing to consider* purchase of a given product, whether or not they actually do purchase the product.

To estimate primary and secondary participant markets, we had to use data from tourism and wildlife agencies of the United States and Canada as well as British Columbia. Our computations and projections are therefore based on a blending of data sources. This is an important limitation.

We have differentiated between two markets. The first, referred to as *Immediate Market*, consists of estimates of the numbers of people who are very likely to participate or who are already participating in wildlife viewing. The second, referred to as *Market Growth Potential*, is a projection of the potential to access broader, larger markets.

Table 2 summarizes the results of our calculations of market sizes and potentials. Detailed discussions of the derivations of these figures are presented in Appendix D. Readers with special interest in market data are advised to consult this appendix for information on their origin, computation, and significance.

The estimated sizes of the immediate markets probably reflect fairly closely the volumes of participants that could be attracted to enjoy wildlife viewing tourism in British Columbia, provided sufficient viewing products are developed and effectively marketed. The primary participants market size is estimated at 10.7 million visitor days. Secondary

participants comprise a market of about 2.2 million persons. Although it cannot be estimated with precision how many wildlife viewing tourists are presently being attracted, these market sizes reflect how much could be lost to other jurisdictions if suitable products and associated marketing programs are not developed in British Columbia.

The primary participant markets particularly contains significantly different subsegments: casual, committed and expert. The greatest prospects for growth appear to be with casual and expert participation.

The potential markets for British Columbia's products are immense. The growth potential of primary participation markets (including residents and nonresidents), appears to be roughly 30% (from 10.7 to 14 million days). This growth potential could apply to actual participation by casuals and experts as well as to overall market sizes. The growth potential of secondary participation markets appears to be as much as 90% (from 2.1 to 4 million participants in the market). Thus, the markets are substantial. The challenges facing British Columbia are to protect the resource, supply appropriate products, and to attract the participants.

EXISTING INDUSTRY

The study on B.C. Adventure Tourism (Outdoor Recreation Council, 1988) states that 180 companies provide some degree of nature viewing as part of their product, but for the vast majority of these operators, wildlife viewing is only incidential to their other main product offerings. Nevertheless, the economic significance of such incidental wildlife viewing tourism products shouldn't be overlooked. Order of magnitude calculations undertaken by the B.C. Wilderness Tourism Council suggest that the opportunity to view wildlife as a secondary activity for people participating in adventure tourism is worth 16.5 million dollars annually. In other words, incidental wildlife viewing accounts for 13% of the value of British Columbia's adventure tourism sector (Jamieson, 1988).

When we look at who in British Columbia is actually engaged in marketing wildlife viewing as a major product item and providing specialized service in this field, the number of operators shrinks drastically. Currently, 17 companies meet these criteria. British Columbia's wildlife viewing industry is presently small because it is young. The oldest operator has been in business 11 years; many have only been active in the field for five years or less.

To gather information on the existing industry, we interviewed operators. From these discussions, it became apparent that the commercial wildlife viewing in British Columbia could be divided into three segments: Marine Tours (8 operators), Land Tours (6 operators), and Tour Packagers (3 operators). Precise figures on the volume and value of business are impossible to produce due to complexities of trip durations, package pricing, and specific participant numbers, but estimates can be made on the basis of operator-supplied data.

In 1987 the wildlife viewing industry provided 31,500 user days of service for a direct revenue of $2,500,000. This averages to a per day value of $79. Table 3 shows the volumes and per day values by segments.

Marine Segment

The marine segment of the industry focuses on the watching of sea mammals, especially whales, as well as associated sea birds and intertidal zone life. This segment can be subdivided into three groups: small-scale front and midcountry operators, large-scale front and midcountry operators, and small-scale backcountry operators.

Table 2: Wildlife Viewing Markets Summary

	Primary		Secondary	
	Immediate	**Potential**	**Immediate**	**Potential**
Resident	9.14 million visitor days	9.6 million visitor days	1.39 million persons	1.8 million persons
Nonresident	1.52 million visitor days	4.37 million visitor days	0.8 million persons	2.2 million persons
Totals	**10.7 million visitor days**	**14 million visitor days**	**2.2 million persons**	**4 million persons**

Table 3: Wildlife Viewing Tourism Industry –1987

Industry Segment	Subsegment	# Of Operators	# Of User Days	$ per day Average Cost	Segment Value ($)
Marine	Front - small	5	11,500	50	575,000
	Front - large	1	8,000	45	360,000
	Back - small	2	4,000	200	800,000
Land	Natural History	3	6,000	90	540,000
	Guide/Outfitter	3	1,000	150	150,000
Tour Package	Front	3	1,000	75	75,000
Industry Totals		**17**	**31,500**	**79**	**2,500,000**

Small-scale Front and Midcountry Operators

These companies are typically owner-operated and have an investment level of $50,000 to $100,000. They offer one-half to full-day boat trips (often using inflatables) to whale-watching sites. These operators will often charter their services to tour packaging companies. Their clients are in the 30 to 50 years age bracket; 85% come from British Columbia; the remainder from Pacific Northwest.

Large-scale Front and Midcountry Operators

Currently one large-scale company (multi-million dollar investment) offers packaged 2 to 3-day whale-watching tours on the west coast. This operation features hotel-floatel accommodation and uses a fleet of inflatables to take viewers out to whale sites. This operator also offers ocean fishing. Clients of all ages are drawn from British Columbia (85%) and the Pacific Northwest (15%).

Small-scale Backcountry Operators

Two operators currently offer multiday (7 to 10) backcountry wildlife viewing sail cruises, principally in the Queen Charlotte Islands. These businesses are owner-operated. Investment levels differ since one operator leases his vessel while the other owns his. Anthropological tours are a secondary product offering. Clients are predominantly nonresident, approximately 65% from the United States (west coast and northeast), 20% from British Columbia, 10% from eastern Canada, and 5% from Europe. School children and seniors form a significant component.

Land Segment

While the land tour segment offers a wide array of products throughout the province (including waterfowl, birds, and even sea mammals), often through subcontracts to small marine operators, it focuses on multiday trips to view montane wildlife, particularly in the backcountry zone. Two types of operations occur in this segment.

Nature Tour Operators

Three operators provide trips that link wildlife viewing with hiking or rafting activities. These companies lengthen their season by providing international trips in the off-season. The companies range from owner-operated to partnership. The largest of these companies has expanded to undertake some adventure travel wholesaling. Hiking, canoeing, and sea-kayaking trips are secondary product offerings. Client origin varies: 50 to 75% from British Columbia; 5 to 50% from the west coast of the United States; 0 to 20% from the rest of Canada. Since trips in this sub segment are physically demanding, clients tend to be younger (30 to 50 years).

Guide/Outfitters

Currently, three guide/outfitters are seriously involved in offering wildlife viewing product. (At least another 10 are poised to enter the field.) Wildlife viewing is offered in the summer; hunting in the fall and sometimes in the spring. The guide/outfitter operation uses trail horses and often rustic cabin accommodation. Existing operators (and those keen to enter the sector) note difficulty in connecting with their market: the wildlife viewing customer is often a different kind of client with different expectations than the traditional hunter. Most guide/outfitter viewing clients (50 to 60%) are drawn from British Columbia and Alberta. The remainder come from west coast and northeastern United States and eastern Canada.

Tour Packagers

Tour packagers are only just entering the wildlife viewing field. Currently, three operators focus on providing packaged bus tours oriented to whale watching. These packagers charter small-scale marine tour operators to take their guests out to the whale areas. Although their original emphasis was on British Columbia residents, they are now broadening to an international clientele. Packagers indicate that they are starting to market their product through wholesalers in northeastern United States cities, especially New York.

Marketing Approaches of the Existing Industry

To date, marketing in the industry has displayed the following characteristics:

1. **Individualized effort.** Most operators have felt their way into the business on their own. They have rarely worked together on cooperative marketing and have few linkages with other components of the travel industry (for example, airlines, wholesalers, hospitality suppliers).

2. **Reliance on Personalized Sales.** Successful operators who have been in business three to five years started with sufficient capital to survive while developing a reputation for quality, reliability, and consistency. Once established, many have reduced their marketing budgets in order to concentrate on quality service and direct sales. Most of their business comes from word of mouth and mail-list contacts.

3. **Little Use of Travel Intermediaries.** Largely because most wildlife viewing businesses are either small or relatively new, little use has been made of the travel trade to distribute or promote the viewing product. Most suppliers feel their clientele do not expect to find suitably well-informed travel agents and therefore seek out information about wildlife viewing travel products in other ways. Few operators have advertised in the specialty media because they are convinced that bookings are generated through more direct personal sales via clubs and associations, university extension programs, direct mail and speaking tours.

Growth Prospects and Future Trends

Over the past five years all segments of the adventure travel industry have been experiencing growth rates that exceed those recorded for tourism as a whole. The growth rate for 1988 is projected to be 20%. This growth has been fueled largely by the "baby boom" segment of the population.

As these people age, their interests and needs are changing. They now tend to have more disposable income but less time than in earlier years. Also, they are less inclined to want rugged or risky experiences. Consequently, activities such as wildlife observation, currently of greatest appeal to the 35-54 age group, are likely to experience the fastest growth. Interest in wildlife viewing has also been stimulated by the increase in the number of wildlife-related programs and articles in the media.

Discussions with many operators indicate that they believe they could double their business in the short term if they so desired. Most choose not to grow, preferring instead to operate a smaller business that offers them a quality lifestyle and does not threaten to create environmental impact problems.

However, the industry is evolving. Several guide/outfitters are seriously interested in getting involved. More importantly, the arrival of tour packagers and travel wholesalers should expand the industry's offering, particularly in the frontcountry. It seems likely, therefore, that as the sector develops, tour packaging and travel wholesaling will achieve much greater penetration, first in the regional market (British Columbia, Alberta, Pacific Northwest) and later in the more distant markets of California, northeastern United States, eastern Canada, and eventually Europe (particularly Germany and Britain) as well as Japan.

Table 4 shows the product areas that are currently being offered as well as those which could be provided. It shows that several wildlife viewing products are not yet being offered that could be, for example, midcountry grizzly, frontcountry waterfowl, and frontcountry montane wildlife. Even where the product is now available, it's apparent from the market analysis that the potential for growth is exceptional.

Table 4

Wildlife Viewing Tourism Industry: Existing Potential Product Offering

	Frontcountry		Midcountry		Backcountry	
Product	**Existing**	**Potential**	**Existing**	**Potential**	**Existing**	**Potential**
grizzly	nil	nil	nil	major	nil	minor
raptors	nil	major	nil	major	nil	minor
predators	nil	nil	nil	nil	nil	minor
waterfowl	minor	major	nil	nil	nil	nil
songbirds	nil	minor	nil	nil	nil	nil
sea mammals	major	major	major	major	major	major
montane wildlife	nil	major	minor	minor	minor	major
small mammals	nil	minor	nil	nil	nil	nil
spawning fish	minor	major	nil	minor	nil	nil

Chapter 5

Development Approach

This chapter discusses those issues that need to be addressed during policy development, suggests an approach to developing policy, outlines the other steps needed to ensure a well-managed, economically viable resource, and presents development and management prescriptions for 25 specific sites and tours.

British Columbia's wildlife viewing resource is world class. In fact, the diversity and populations of species, the length of season in which viewing is possible, the range of habitats within which wildlife may be viewed, and the top calibre scenic and wild quality of these habitats give British Columbia the best wildlife viewing capability of any jurisdiction in North America. This resource is especially suited to tourism since so many of this province's species have exceptionally high appeal, for example, grizzly bears, whales, eagles, montane wildlife, and waterfowl.

Compared to other jurisdictions, British Columbia is stepping into the lead by undertaking this study and presumed follow-up actions. The province has the opportunity to translate this leadership into capturing a major share of the emerging wildlife viewing tourism market. This is a bright prospect given that the potential market is very large.

While British Columbia has an exceptional resource with strong product suitability, a sizable potential market in which to promote that product, and a headstart in the effort to capture that market, it is deficient in its ability to deliver the product: presently, only a few, and for the most part small, operators exist. As well, virtually no mechanisms are in place to ensure that the wildlife viewing resource will be managed and maintained in a sustainable, high-quality condition. To overcome these deficiences, government needs to define policies with respect to wildlife viewing and undertake various actions to ensure that the resource is well managed while being developed to its potential.

DEVELOPMENT ISSUES

The key issues affecting development need to be identified so that policymakers are informed of the choices available to them. Accordingly, this section deals with the major issues that will affect the development of wildlife viewing tourism in British Columbia.

- Management of environmental impact
- Competing land-resource users
- Land-base administration
- Integration of viewing and consumptive uses
- Operator licensing, tenure and fees
- Financing wildlife viewing tourism
- Education and interpretation
- Training
- Safety
- Roles of public and private sectors

Management of Environmental Impact

If wildlife viewing is promoted without also attending to environmental issues, the quality of the resource, especially on fragile sites, will deteriorate:

- Wildlife numbers may decline due to habitat degradation.
- Wildlife may become more dispersed and viewing less reliable in response to heavy pressure.
- Wildlife may suffer stress and decline in reproductive rate from viewer harassment.

From a commercial standpoint, such environmental degradation would result in a poorer quality and less reliable product, which would affect the industry's ability to attract customers and to compete with other jurisdictions. British Columbia residents might attempt to limit or close down wildlife viewing tourism. And, resident hunters and commercial big game guides would be concerned if wildlife viewing activities started to affect the quality of their hunting experience or degraded the habitat upon which wildlife depend.

As is the case for any resource-based activity, to ensure that the quality of wildlife viewing remains high, environmental impact management techniques such as the following must be considered.

Education

Public education programs (brochures, instruction, signs, etc.) should be used to explain to viewers how to minimize the impacts of their activity on wildlife and related habitat. Both wide-scale (i.e. provincial) and site-specific information will be required. Government should take prime responsibility for preparing this material, with industry assisting in distribution.

Site Hardening

The environmental resilience of some sites can be increased using site hardening techniques such as strategically located viewing platforms, board walks, and gravelled trails. Site hardening especially should be used in those frontcountry locations where heavy visitation can be anticipated. (It will also usually be cost-effective only in the frontcountry.)

Site Exclusion

Particularly sensitive sites should be permanently excluded from wildlife viewing in order to preserve environmental values.

Limited Entry

Some environmentally sensitive sites, especially those in the backcountry, may require restricted use. In this case, a limited-entry prescription that restricts the number of people in a viewing season, party size, or visit duration might be required. (This is similar to the limited entry system used to regulate the hunting of sensitive wildlife populations.) To arrive at a rational entry prescription, research on site resiliency and visitor carrying capacity should be undertaken.

Guide Accompaniment

The negative impacts of viewer use can be reduced by requiring the use of qualified and legally accountable guides. This would be an especially appropriate policy for the backcountry, but it may also be appropriate in sensitive sites within the other two zones.

User Permits

User permits are used in some backcountry areas (such as National Parks) to monitor use levels in sensitive areas. They could be used to limit entry should the need arise.

Regulation by Seasons

Seasons like those used to manage hunting could be used to regulate viewing activity on sensitive sites. Seasons could be used to close sites or parts of sites during critical nesting periods, rutting periods, etc.

Species Sensitivity Management Prescriptions

The sensitivity of animals to viewing varies greatly by species. Therefore, individual species sensitivity should be identified and appropriate management prescriptions developed. In many cases, the limited extent of current knowledge on the topic will require that research be undertaken on a species-by-species basis – prior to management policy formation.

Facility Siting and Development

With careful planning, facilities can be sited and developed so as to minimize environmental impacts.

Permanent wildlife viewing facilities should be minimized in the backcountry so that wilderness values aren't impaired. Instead, they should be built on the perimeter (in the midcountry) at sites that enable users to venture into the backcounty. Such a strategy retains wilderness values, reduces impacts on wildlife, and retains the integrity of the backcountry for a greater number of comparatively high-paying clients.

In front and midcountry areas, facilities should be built a suitable distance from wildlife use areas so that animal behaviour is not disturbed. Such facilities should also be located to minimize loss of wildlife habitat, minimize environmental pollution (from sewage, garbage, etc.) and designed to blend with the natural environment.

Appropriate Marketing and Publicity

Since marketing helps generate and target use, publicity and advertising should be environmentally appropriate. While promotional material may use pictures from backcountry and other environmentally sensitive sites in a generic, nonspecific manner to establish product image and quality, such fragile sites should not receive high-profile focused publicity. Otherwise, overuse and environmental deterioration could result. Rather, advertising should direct use to resilient sites. In this case, publicity *should* be site and package specific, high profile and mass-oriented.

Competing Land-resource Users

Considerable attention has been focused in this report on ensuring that the wildlife viewing industry does not erode the environmental quality of the resource base upon which it and other wildlife users depend. Crucial as this is, it must not be forgotten that other users of the land base can have a much more profound impact on the well being of wildlife and its habitat. Resource extraction industries such as forestry and mining cause landscape changes that can devastate or sometimes enhance wildlife viewing possibilities.

The habitat changes created by these industries can affect animal numbers, behaviour, species diversity, viewing reliability, and scenic values. As the Wilderness Tourism Council notes, "People will pay well and travel far to see a grizzly bear in a pristine Khutzeymateen Valley, but they won't come to see that same bear in the middle of a clearcut."

Therefore, if government is intent on fostering the wildlife viewing industry, it must retain the integrity of those areas upon which wildlife depends. Critical locations–high-calibre view sites and important wildlife habitats (for example, whale-gathering areas, big game winter ranges, waterfowl nesting and staging areas)–must be preserved. Such preservation must often incorporate some protective measures for the surrounding viewscape as well. In less crucial, but nonetheless important, wildlife areas, integrated resource management practices must be adhered to.

Information on significant wildlife viewing values must be provided to other land-resource users to ensure that inadvertent impacts do not occur. To this end, the wildlife viewing sites identified in this study should be entered on the Ministry of Forests and Lands computer mapping database.

Land-base Administration

In order to protect the interests of the wildlife viewing industry, further Wildlife Management Areas beyond the six already in existence may need to be established and key private lands may also need to be acquired.

Other jurisdictions have established land preservation systems specifically oriented to the needs of wildlife. The extensive Wildlife Reserve system administered by United States Fish and Wildlife is an excellent example of this. Such areas not only protect population and habitat values, but also provide a distinctive, recognizable image, which enhances the marketing of wildlife viewing. Therefore, government should consider establishing a system of land reserve areas in British Columbia oriented to wildlife viewing –probably using the Wildlife Management Area status. This system would complement–not replace–other parallel reserve programs (e.g., Provincial Parks). Ideally, such a system of wildlife viewing areas would include representation of all zones as well as a variety of wildlife viewing products.

Integration of Viewing and Consumptive Use

Integration of consumptive and viewing uses of wildlife resources is essential to the successful and sustained development of both kinds of wildlife-related activities . As far as wildlife viewing interests are concerned, direct encounter with hunting parties will reduce the quality of viewer experience. Wildlife also becomes more wary and harder to view when it is hunted. From the consumptive perspective, improperly managed viewer activities can cause game to leave an area, with the result that hunting success or quality of experience declines.

Given the varying philosophical perspectives that sometimes characterize participants of each group, failure to achieve an integrated management policy could result in conflict. Therefore, the Wildlife Branch needs to investigate regulatory techniques, such as seasons, access control, and guide licensing, that can be used to meet the needs of both the viewing and consumptive wildlife user. Input from key organizations (e.g. wildlife viewing operators, Federation of B.C. Naturalists, B.C. Wildlife Federation, Guide/Outfitters Association, Wilderness Tourism Council) should be sought to help government formulate policy.

Operator Licensing, Tenure and Fees

As with any Crown land-based resource, some form of licensing is required (particularly in the mid and backcountry zones) to regulate commercial operators, to collect economic rent, and to ensure protection of the resource. Furthermore, a licensing system (and perhaps tenure) will enhance the private sector's interest in wildlife viewing since it offers operators the security needed to justify investment and raise capital. Therefore, a wildlife viewing equivalent of the hunting sector's Guide/Outfitter Licence system should be instituted in the mid and backcountry zones.

Such licensing could regulate use levels (similar to quotas under the hunting system), viewing seasons, performance standards, and possibly facilities development (though the latter might best be handled by other administrative techniques, such as licence of occupation).

Presumably, these licences would entail an annual fee (perhaps linked to such things as use levels and investment) and might also require a bond to ensure environmental protection. Such a licence might be linked with a territory (as are Guide/Outfitter Licences) to protect against overuse, or they might be more locationally flexible. These and associated questions should be addressed as part of the policy development process.

In the frontcountry, licensing is a less critical issue since concerns related to environmental sensitivity, operator accountability, and exclusive rights to a territory are not as significant. Regulation in the frontcountry will likely focus on quality of service. A consumer-oriented standards approach, similar to the one used by the Tourism Ministry to identify government approved accommodations and restaurants, might be appropriate.

Residency Requirement

Current operators are concerned that failure to have such a residency requirement could result in the wildlife viewing sector being flooded by nonresident companies to the detriment of the provincial industry. They say that this is already happening in the Robson Bight whale-watching area. Therefore, government should determine whether residency will be required for an operator to be eligible for a licence.

Existing Operators

If a licensing system is instituted, what role should existing operators, particularly guide/outfitters, play? It can be argued, on the one hand, that guide/outfitters should be offered a first refusal to operate wildlife viewing operations in their existing hunting territories. They already have the infrastructure to allow easy servicing of the clientele. (To license another operator would mean duplicating facilities, an undesirable option particularly in wilderness areas.) It would also help create more economically viable operations and reduce the potential for commercial hunting-nonhunting conflict. Guide/outfitters know the best places to view game in their territories, thereby enhancing customer satisfaction, and they have a vested interest, in minimizing stress on the animals. (Animals frightened by viewers in the summer are going to be much more difficult to hunt in the fall.)

On the other hand, guide/outfitters may not wish to offer wildlife viewing services and may not have the skills to do so. Customers expect more sophisticated facilities and want trip staff to have a good knowledge of biology. In addition, such a policy could 'lock up' opportunities that other operators might be able to undertake more effectively.

Fees

Though studies cited in Chapter 4 reveal that large economic benefits are associated with wildlife viewing, such values have largely gone unrecognized because users have generally not paid for wildlife viewing. Consequently, its worth has not been measurable in the marketplace. As a result, government has failed to appreciate the activity's importance and thus has provided few wildlife viewing services to the public. As wildlife viewing tourism in British Columbia develops and people demonstrate a willingness to pay to view wildlife, government and society will increasingly recognize this activity and hopefully respond by increasing the commitment to manage wildlife for viewing purposes.

While residents should not have to pay for the opportunity to simply watch wildlife, they could be expected to pay when wildlife viewing occurs in an area enhanced with trails, interpretive centres, lodges, etc. When such money has flowed from the public sector, government should be able to collect some sort of user fee.

Nonresidents could be expected to pay a fee for their use of the resource as nonresident hunters currently do. This would be particularly appropriate in the mid and backcountry. Fee collection could be incorporated into the price of guided packages, or if participants choose to travel on their own, it might take the form of a permit. (Nonresidents might also be required to be accompanied by a licensed guide as are nonresident hunters.)

Financing Wildlife Viewing Tourism

Development of the wildlife viewing industry will require both public and private-sector investment. The public sector's role can be expected to be greatest in the frontcountry where higher-traffic facilities will be required. Since this infrastructure (e.g., interpretive centres) will benefit both the tourism economy and the quality of life of British Columbians, it is appropriate that government take the lead in financing some of these projects. Private sector will finance tour transportation and packaging in this zone.

In the mid and backcountry, the private sector will likely take the lead in investment, building lodges and camps, and providing outfitting services. (In these zones, government's role will likely be more regulatory.)

The wildlife viewing resource, like any other Crown resources, is a provincial asset and therefore should receive significant funding from provincial revenues for its management and protection. Operator fees and participant fees should also be used to help defray management costs. Care must be taken that such fees are suitably valued. (A wildlife viewing operator who operates in a Provincial Park pointed out that his yearly lease fee is $140, whereas the guide/outfitter who uses the same area pays in excess of $20,000 in various fees. Appropriate fee valuation would presumably lessen such a discrepancy.)

Since jobs and expenditures are generated by wildlife viewing tourism, development of the sector benefits the province. Therefore, general incentive programs to aid private ventures, such as the Economic and Regional Development Tourism Sub-agreement, are appropriate. Until now, only larger-scale tourism operations have been able to benefit from this program. To assist the wildlife viewing sector, which is characterized by smaller scale tourism operations, the minimum funding threshold should be lowered to $20,000.

Representatives from the B.C. Wilderness Tourism Council and the B.C. Wildlife Federation believe that the Habitat Conservation Fund should acquire and manage key wildlife lands for both wildlife viewing and consumptive purposes. They suggest that interested citizens groups, individuals, and participants on commercial wildlife viewing trips could be encouraged to donate to the Fund.

Education and Interpretation

Wildlife viewing has an important educational aspect. Visitors come, not only to watch animals, but also to learn more about them. Tour operators consistently report that their clients expect interpretation to be part of the package. Education is also important to help viewers see wildlife more reliably. Most people don't know where or how to look for animals in the wild. Even at designated viewing platforms, if people aren't told what to look for, they may not see wildlife even when it is in the vicinity. This can result in viewer dissatisfaction. Therefore, a variety of educational services need to be developed to support and strengthen the wildlife viewing sector. These include:

a) interpretive centres

b) naturalist-guides

c) interpretive brochures

d) interpretive signs

Interpretive Centres

Interpretive centres, such as those at Creston, Kokanee Creek, and Long Beach, provide displays, print materials, and audio visual presentations related to the wildlife viewing resource. These facilities are geared to high-volume usage and are therefore a frontcountry feature. To be cost effective, interpretive centres should be located at view sites with long seasons. Given construction and maintenance costs, and the need for reliable, prolonged viewing opportunities, only a limited number of sites in the province will likely be able to justify developing such centres.

Naturalist–Guides

The use of a wildlife specialist to guide groups of people through viewing opportunities is an important service element. Such naturalist offerings may entail discrete 1 or 2 hour programs or may be a feature of a multiday tour. Short-term naturalist programs can be offered in frontcountry locations in conjunction with parks or interpretive centres, or as part of day tour packages. Multiday naturalist services are a key aspect of front, mid and backcountry tours. Often, the naturalist's expertise determines a participant's choice to book onto a particular tour. Therefore, to build

a strong industry that is competitive with other jurisdictions, British Columbia's wildlife viewing sector must offer well-trained naturalists as an integral part of its product.

Interpretive Brochures

Interpretive brochures enhance the wildlife viewing product by providing in-depth information to the participant. Therefore, provision of quality materials is an important feature in the development of the sector. The following types of material are needed:

- A synoptic directory that outlines wildlife viewing in British Columbia (complete with maps) and identifies key sites. Oregon has produced an excellent example of such a brochure under the name of *Oregon's Watchable Wildlife*.
- Background pamphlets on particular species and their behaviours. Both the Canadian Wildlife Service and British Columbia Fish and Wildlife have published excellent examples.
- Brochures that explain how to view wildlife safely and with minimal environmental impact. Parks Canada's publication *You are in Bear Country* is an example of such materials.
- Site-specific pamphlets that help visitors get more out of their visit. Excellent examples of such guides are found in the various National Parks across Canada and the United States.

Interpretive Signs

Signs should be used in the following ways to support and enhance wildlife viewing:

- On highways and roads to help viewers locate sites.
- At highway pull-outs or viewpoints to interpret various wildlife features.
- In a sequence along paths or roadways (like the nature walks and scenic drives in Provincial and National Parks).
- To direct use into more environmentally resilient areas.
- To inform viewers of the safest and least intrusive way to watch animals.

Such signs should incorporate standardized design elements to create an identifiable wildlife viewing sector.

Training

Growth in the wildlife viewing sector will generate new employment opportunities. To ensure a quality product, new people in the sector will have to be suitably trained. While a few colleges (Capilano, Northwest, Selkirk) are providing courses relevant to wildlife viewing tourism, none offer a program that integrates all the skills needed to operate a successful wildlife viewing tourism business. What is required is a combination of biology, geography, and communication skills as well as business management and marketing skills.

Therefore, such a wildlife viewing curriculum package should be developed and co-ordinated under the Pacific Rim Institute of Tourism in conjunction with the commercial wildlife viewing sector. It could be offered in suitable locations by various regional colleges. Training programs should be tailored to meet the needs of the newcomer to the field as well as those of experienced adventure travel operators, such as guide/outfitters and river rafters, who wish to refine their wildlife viewing skills.

Safety

Ensuring viewer safety is an important factor in wildlife viewing, especially for high-hazard species such as grizzly bears. Techniques to minimize risks will include facility siting (e.g. to ensure people-animal separation), education, management regulations, and access control.

Government needs to identify the range of safety techniques available and formulate regulations and industry safety standards. Where background data is inadequate to permit such policy formulation, the necessary research should be undertaken.

Public and Private-Sector Roles

Both public and private sectors have roles to play in achieving the objectives of economic development and environmental protection. These roles need to be defined. To help with this, the following is a summary of what we see as the major responsibilities of each sector.

Responsibilities of the Public Sector

1. To plan, manage and protect the wildlife resource, habitats and associated land base for quality and sustainable viewing use.
2. To monitor the performance of the industry.
3. To foster an economically healthy and environmentally responsible industry by means of operator licensing and education programs.
4. To facilitate new business operations by applying existing tourism financial incentive and assistance programs to wildlife viewing.
5. To develop and perhaps operate high-visability, frontcountry viewing sites in selected locations. In some instances, such initiatives could be undertaken in conjunction with local communities.
6. To collect economic rent, taxes and fees for the use of Crown wildlife viewing resources to help defray management and other costs.
7. To provide province-wide public information about wildlife viewing opportunities.
8. To perform a generic publicity and advertising function, particularly for nonresident markets, to create awareness about the range and quality of British Columbia's wildlife viewing opportunities.
9. To undertake research as required to enable better product and industry development, more successful marketing, more effective resource management, and safer, less environmentally intrusive use.

Responsibilities of the Private Sector

1. To invest in the development of well-priced, good-quality service on a competitive basis.
2. To assess specific business opportunities and develop product in the front, mid and backcountry.
3. To package and market specific product offerings.
4. To assist the public sector in managing the use of the resource (particularly in the backcountry).
5. To educate and supervise customers to ensure that they cause minimal environmental impacts.
6. To ensure customer safety.
7. To self-regulate the service quality, safety and environmental sensitivity of the industry through an operators' association.

POLICY DEVELOPMENT

To develop and manage wildlife viewing tourism, government must first formulate policy to provide the framework. Thus, we suggest the government develop a wildlife viewing policy paper. Such a paper should build on this report and involve knowledgeable

individuals in government, commercial sectors, and citizens groups. It should address the following issues:

- environmental protection strategies;
- guide licensing, training, and accountability;
- viewer safety;
- public information, education, and participation;
- funding alternatives for wildlife viewing management and privately owned land-base acquisition (including operator and user fee programs);
- interactions between wildlife viewing and other land-base uses (e.g. forestry, mining);
- integration of wildlife viewing and consumptive wildlife use;
- land-base administrative alternatives.

Once the paper is drafted, it should be reviewed by the public, industry and government agencies. Upon final revision, the policy should be reviewed and ratified at the ministerial level.

THE NEXT STEPS

Once policy has been developed, government needs to undertake the following steps:

1. Establish resource management capability.
2. Develop a systems plan.

Resource Management Capability

Concern about environmental sensitivity is meaningless if the ability to manage and regulate the resource is lacking. Therefore, government must develop the means to manage the wildlife viewing resource before it promotes this form of tourism. We suggest the following steps be taken:

1. The Wildlife Branch should be designated as the agency responsible for managing the wildlife viewing resource.
2. Adequate budget and staffing should be allocated to enable the Branch to manage wildlife viewing.
3. Regulations should be prepared and adopted pursuant to the Wildlife Act.
4. Training programs to acquaint conservation officers with the nature and enforcement requirements of wildlife viewing should be developed and delivered.
5. Research required on wildlife viewing inventory sites should be undertaken, particularly as it relates to the environmental sensitivity of, and management considerations for, the 51 choice sites and any other sites slated for development or increased viewer use.
6. Research on environmental impacts of wildlife viewing activities should be undertaken to provide data for developing strategies to minimize such impacts.

Systems Plan

To ensure that the needs of economic development and environmental quality are integrated, government needs to prepare a wildlife viewing systems plan. This plan should dovetail with other wildlife management programs already being delivered. Specifically, the plan should:

- be based on the front, mid and backcountry zoning system, and develop environmental

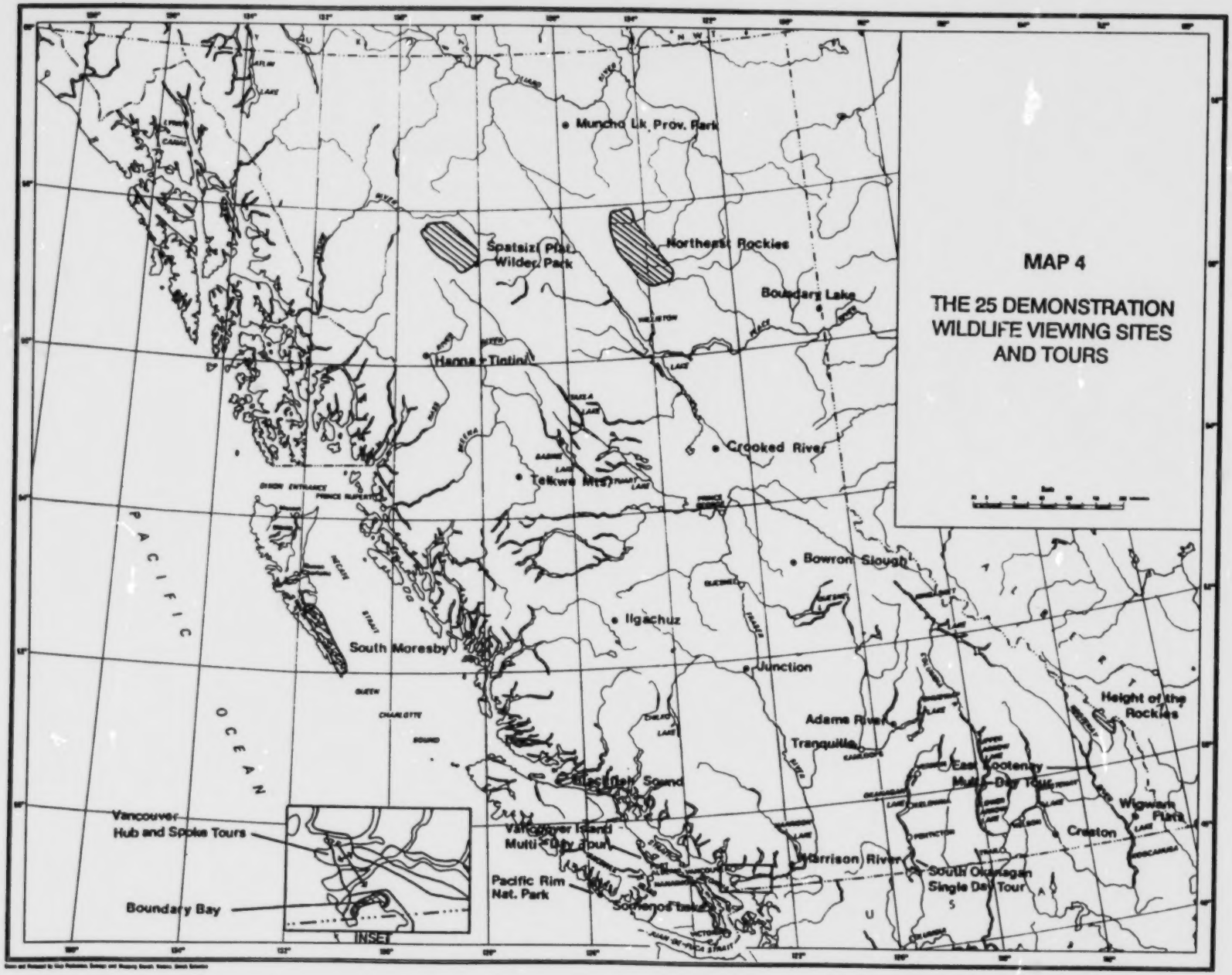
management prescriptions on a zone-by-zone basis;

- identify the sites that government itself chooses to develop;
- identify sites where involvement by the private sector or by local governments is possible;
- identify the sites that should be administered by the Wildlife Branch as Wildlife Management Areas;
- identify those sites where acquisition of private lands by the Wildlife Branch is considered important to the protection or enhancement of wildlife viewing opportunities;
- identify other agencies involved in wildlife viewing and determine (in association with those agencies) their role, and the lands administered by them;
- identify environmentally sensitive sites;
- identify sites where enhancement techniques can be used to improve wildlife viewing;
- identify sites with special wildlife viewing safety hazards;
- identify education and information support requirements
- establish a time table for the development of wildlife viewing;
- establish the responsibilities of the various actors involved in plan implementation.

Government should invite agencies, citizens groups and the wildlife viewing industry to participate in preparing the systems plan. When it is completed, it should be reviewed and endorsed at the Ministerial level to ensure government is committed to its implementation.

PRESCRIPTION SUMMARIES

If new wildlife viewing operations are to be encouraged in the private sector, government needs to identify locations where the resource is especially promising and resilient. In addition, since wildlife viewing is a new industry, the government may need to elaborate on development and management prescriptions. To help with this, we have developed demonstration site prescription summary sheets for 21 of the 51 choice sites identified in the inventory and for 4 tour packages each comprising up to 6 viewing sites. These sites have been selected on the basis of product, package, region, and zonal representativeness in order to reveal the range of possibilities that currently exist for wildlife viewing tourism. (See Map 4.)


MAP 4
THE 25 DEMONSTRATION WILDLIFE VIEWING SITES AND TOURS
Muncho Lk. Prov. Park
Spatsizi (Plat.) Wilder. Park
Northeast Rockies
Boundary Lake
Hazelton
Hagans
Tintina
Crooked River
Telkwa Mts.
Bowron Slough
Iigachuz
South Moresby
Junction
Adams River
Tranquille
Height of the Rockies
East Kootenay Multi-Day Tour
Wigwam Flats
Creston
Harrison River
South Okanagan Single Day Tour
Pacific Rim Nat. Park
Vancouver Hub and Spoke Tours
Boundary Bay
INSET
PACIFIC OCEAN

Demonstration Site Prescription Summary

BLACKFISH SOUND

PRODUCT TYPE

- Midcountry; sea mammals

PRODUCT DESCRIPTION

- Location: waters around Hansen Island including Blackfish Sound and part of Johnstone Strait near Telegraph Cove; approximately 25 km. east of Port McNeill
- Viewing species/seasons: killer whale (July-mid Sept); dall porpoise, harbour seal (all year); bald eagle (all year)
- Viewing opportunities: dispersed
- Secondary attraction: marine intertidal zone
- Existing access/facilities: boat access

PACKAGE TYPE

- Destination site
- A site in a multiday marine tour

MARKET ASSESSMENT

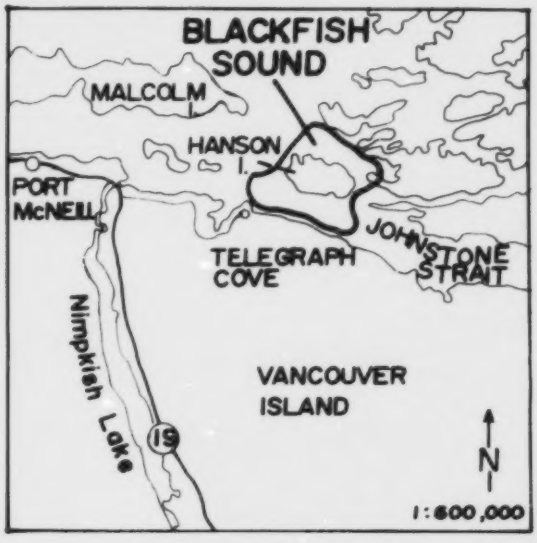
- Appeal : residents and nonresidents (international)
  : primary (casual, committed, expert)
- World class killer whale viewing area

DEVELOPMENT PRESCRIPTIONS

- Investigate potential for increased sail charter and hotel (float or land) based operations

MANAGEMENT ISSUES

- Provide opportunity for whale viewing development without compromising environmental sensitivity of Robson Bight
- Focus industry expansion away from Robson Bight
- License limited number of commercial operators to minimize impact on whales
- Emphasize resident over nonresident operators
- Develop viewing regulations to minimize harrassment impacts of whales by recreationalists
- Minimize conflicts between whale viewing and finfish aquaculture development



Demonstration Site Prescription Summary

PACIFIC RIM NATIONAL PARK

PRODUCT TYPE

- Frontcountry; waterfowl, sea mammals

PRODUCT DESCRIPTION

- Location: along ocean coastline, west coast of Vancouver Island between Tofino and Ucluelet
- Viewing species/seasons: gray whales (Mar-Oct); Steller sea-lion (all year); waterfowl, shorebirds, seabirds (Mar-Oct)
- Viewing opportunities: focused (shorebirds and Steller sea-lions); dispersed (migrating waterfowl and grey whales)
- Secondary attraction: National Park
- Existing access/facilities: paved road, trails, naturalist program, interpretation centre, signs and brochures

PACKAGE TYPE

- Destination site

MARKET ASSESSMENT

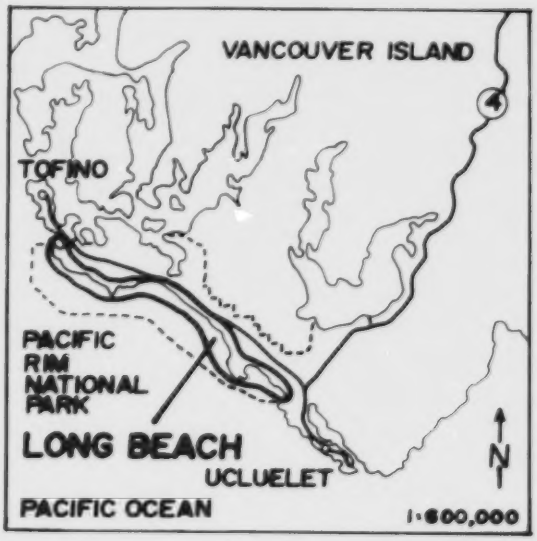
- Appeal : residents and nonresidents (international)
  : primary (casual, committed)
- Good location for introduction of new participants to wildlife viewing
- Best frontcountry opportunity to view whales
- International quality viewing site

DEVELOPMENT PRESCRIPTIONS

- Identify additional whale viewing opportunities
- Need for on-shore whale museum/interpretation centre; locate in local community; link to whale festival

MANAGEMENT ISSUES

- Initiate techniques to minimize viewer impact and harassment of wildlife, especially whales
- Regulate and licence operators to maintain quality of viewing
- Important to co-ordinate management with Fisheries and Oceans Canada and with Environment Canada-Parks



Demonstration Site Prescription Summary

SOMENOS LAKE

PRODUCT TYPE

- Frontcountry; waterfowl, songbirds

PRODUCT DESCRIPTION

- Location: about 2 km. north of Duncan on Vancouver Island just east of Highway 1
- Viewing species/seasons: waterfowl (all year), songbirds (Apr-mid Sept)
- Viewing opportunities: focused
- Existing access/facilities: paved road, education and small interpretation centre

PACKAGE TYPE

- Destination site (local)
- Site in a single-day tour package from Victoria, Duncan or Nanaimo
- Site in a multiday tour package

MARKET ASSESSMENT

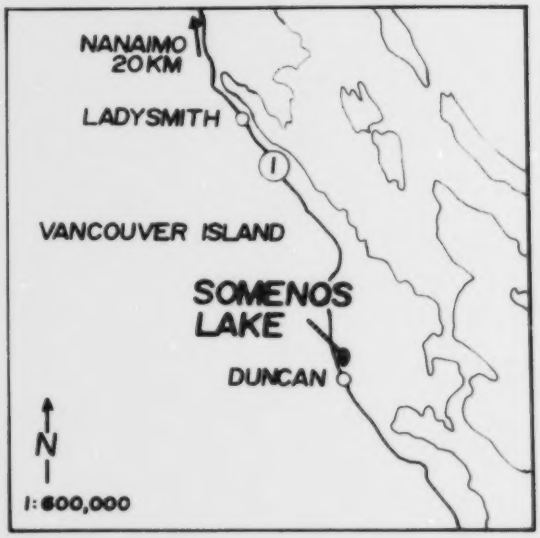
- Appeal : residents (bus tour, educational groups)
- Accessible to large southern Vancouver Island population centres
- Can be linked with a number of other sites in local area, including Cowichan River and Cowichan River estuary

DEVELOPMENT PRESCRIPTIONS

- Need for trails, boardwalk and viewing towers

MANAGEMENT ISSUES

- Opportunity for community based initiative to operate the site as part of a regional ecomuseum concept
- Potential urban encroachment on watershed
- Maintain integrity of the site's natural environment



Demonstration Site Prescription Summary

BOUNDARY BAY

PRODUCT TYPE

- Frontcountry; waterfowl, shorebirds, raptors, sea mammals

PRODUCT DESCRIPTION

- Location: approximately 20 km. south of Vancouver; includes Boundary Bay Regional Park, Boundary Bay proper, Mud Bay and Blackie Spit.
- Viewing species/seasons: snowy owl, short-eared owl (mid Nov.-late Dec.); waterfowl (Oct-Apr); shorebirds (mid Apr-May, July-Sept); raptors (all year); harbour seal(all year)
- Viewing opportunities: focused (large flocks of shorebirds in migration, large wintering flocks of waterfowl)
- Secondary attraction: extensive tidal mudflats
- Existing access/facilities: paved road (all areas), parking (regional park, spit).

PACKAGE TYPE

- Destination site
- Single-day tour site
- A site in a multiday tour package

MARKET ASSESSMENT

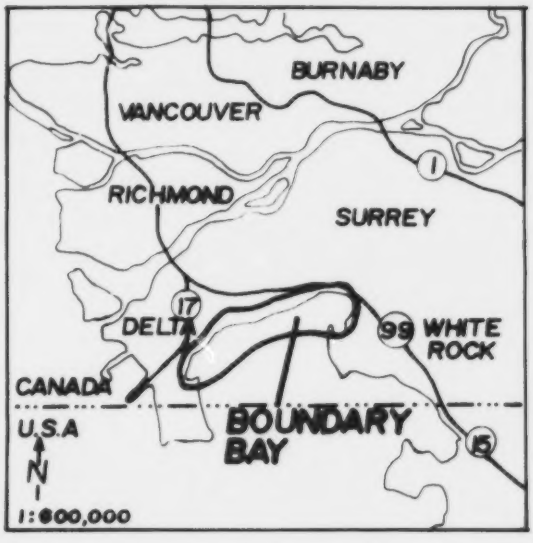
- Appeal : residents and non-residents (international)
  : primary and secondary (casual, committed, expert)
- Easy introduction for new wildlife viewing participants
- World class viewing opportunities for shorebirds in migration and wintering flocks of waterfowl

DEVELOPMENT PRESCRIPTIONS

- Need for parking, viewing towers and interpretive centre
- Investigate potential for foreshore boardwalks or extended pier
- Secure RAMSAR designation

MANAGEMENT ISSUES

- Co-ordination with other agencies
- Land aquisition and land transfer for management
- Potential conflict with use of Boundary Bay Airport, particularly bird-plane collisions; safety



Demonstration Site Prescription Summary

HARRISON RIVER

PRODUCT TYPE

- Frontcountry; waterfowl, raptors, fish

PRODUCT DESCRIPTION

- Location: includes Harrison Bay and Weaver Creek; about 30 km. northeast of Mission City, north of the Fraser River
- Viewing species/seasons: trumpeter swan, bald eagle (mid Nov-late Feb); waterfowl (Oct-Feb); shorebirds (Sept-Oct); sockeye chum and pink salmon (Oct- Nov)
- Viewing opportunities: focused
- Secondary attraction: mudflats
- Existing access/facilities: paved and good gravel roads, parking, trails, education and interpretation (Weaver Creek)

PACKAGE TYPE

- Destination site
- Single-day tour site in Vancouver (focused). Hub and Spoke tour package

MARKET ASSESSMENT

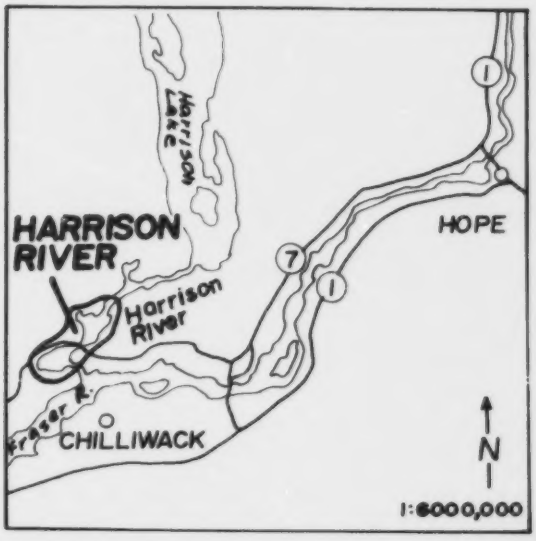
- Appeal : residents and nonresidents
  : primary and secondary
- Large concentration of bald eagles expected to attract visitors from western Washington state

DEVELOPMENT PRESCRIPTIONS

- Provision of parking and highway pull-outs required
- Need for viewing tower(s)

MANAGEMENT ISSUES

- Private land acquisition of foreshore on northwest side of river
- Use river to separate viewers from wildlife



Demonstration Site Prescription Summary

TRANQUILLE

PRODUCT TYPE

- Frontcountry; waterfowl, shorebirds, songbirds, raptors, montane wildlife

PRODUCT DESCRIPTION

- Location: immediately west of Kamloops on the north side of Kamloops Lake
- Viewing species/seasons: waterfowl, shorebirds, song birds (Apr-May, Aug- Sept); raptors (Oct-Mar); mule deer (late Feb-mid Apr); California bighorn sheep (Nov-May)
- Viewing opportunities: focused (excellent area for rare bird species)
- Secondary attraction: Kamloops Lake, Tranquille River and rock forms
- Existing access/facilities: paved and good gravel roads

PACKAGE TYPE

- Destination site
- A site in a Kamloops-based single-day tour package

MARKET ASSESSMENT

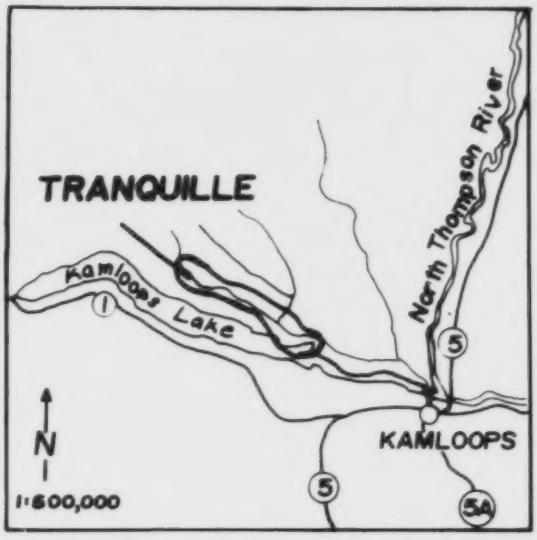
- Appeal : residents and nonresidents
  : primary (casual, committed, expert)
- Diversity of migrating waterfowl, shorebirds, songbirds and raptors
- Excellent area for rare bird species

DEVELOPMENT PRESCRIPTIONS

- Need to secure river foreshore area from British Columbia Building Corporation
- Need for viewpoints, parking and interpretive signs.

MANAGEMENT ISSUES

- Consider ATV closure
- Potential conflict with increased use of Kamloops Airport, particularly bird-plane collisions; safety



Demonstration Site Prescription Summary

ADAMS RIVER

PRODUCT TYPE

- Frontcountry; fish, raptors

PRODUCT DESCRIPTION

- Location: within Roderick Haig-Brown Recreational Area between Adams and Shuswap Lakes approximately 12 km. northeast of Chase
- Viewing species/seasons: sockeye, chinook, pink and coho salmon (late Sept-Oct); bald eagle (Oct-Feb)
- Viewing opportunities: focused (major runs in fall of 1986, 1990, etc., secondary runs following year)
- Secondary attraction: riverine landscape, vegetation
- Existing access/facilities: paved road, parking trails, viewing platform, education and interpretation

PACKAGE TYPE

- Destination site

MARKET ASSESSMENT

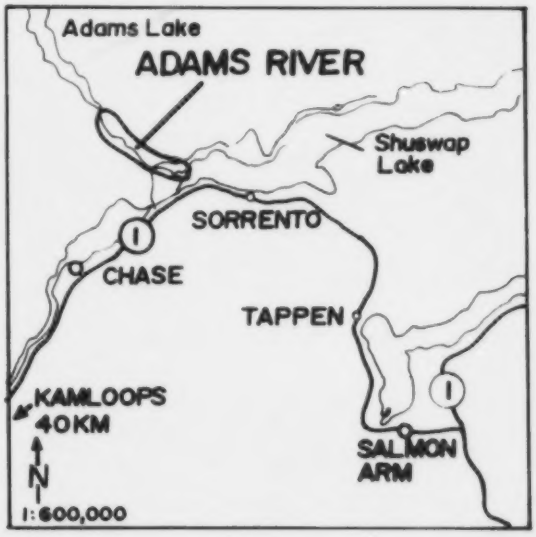
- World class viewing experience of mass viewer appeal.
- Appeal : residents and nonresidents
  : primary and secondary (casual, committed)
- Easy introduction for new wildlife viewing participants
- Self guided and guided tours
- Short season for viewing with critical timing

DEVELOPMENT PRESCRIPTIONS

- Upgrade and increase capacity of existing facilities to lessen impacts of increased visitation; trail hardening; more parking

MANAGEMENT ISSUES

- Requires detailed site use plan
- Maintain adequate staffing levels to ensure public can be adequately supervised so as to minimize disturbance to spawning fish



Demonstration Site Prescription Summary

CRESTON VALLEY

PRODUCT TYPE

- Frontcountry; waterfowl, songbirds, raptors,

PRODUCT DESCRIPTION

- Location: about 10 km. west of Creston extending from the south end of Kootenay Lake southward across Highway 3
- Viewing species/seasons: waterfowl, raptors (all year); black tern, Forrester's tern, shorebirds, songbirds (Apr-Sept)
- Viewing opportunities: focused (species composition varies; over 200 bird species year round)
- Existing access/facilities: paved road, parking, trails viewing towers; education and interpretation centre; campground

PACKAGE TYPE

- Destination site
- Site in a multiday tour package

MARKET ASSESSMENT

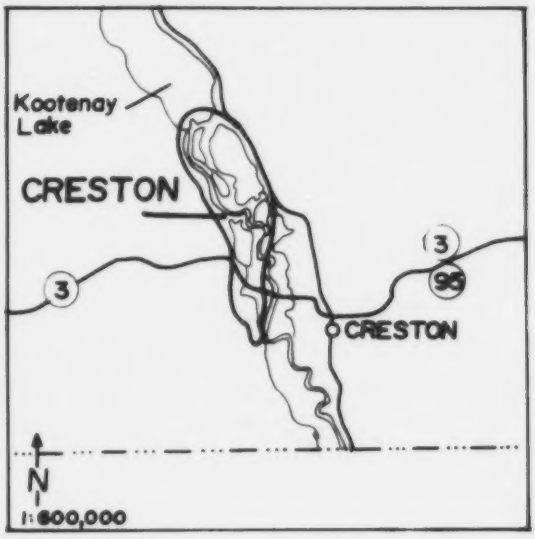
- Appeal : residents and nonresidents
  : primary and secondary
  (educational, committed, expert)
- World class waterfowl migration/nesting site

DEVELOPMENT PRESCRIPTIONS

- Lengthen operating season and associated staffing and budget levels
- Maintain existing facilities
- Need for additional trails, viewing towers and interpretive signs

MANAGEMENT ISSUES

- Foster local community involvement
- Cooperation required with Creston Valley Wildlife Management Authority
- Recent reduction in staffing season has resulted in 40% decline in visitor numbers to intepretive centre



Demonstration Site Prescription Summary

WIGWAM FLATS

PRODUCT TYPE

- Midcountry; montane wildlife

PRODUCT DESCRIPTION

- Location: between Elk River and Lodgepole Creek just south of Highway 3 approximately 25 km. south of Fernie
- Viewing species/seasons: Rocky Mountain bighorn sheep, moose, Rocky Mountain elk, mule deer, whitetail deer (all year)
- Viewing opportunities: focused (visible across Elk River from Highway 3)
- Secondary attraction: spectacular Rocky Mountain scenery
- Existing access/facilities: paved highway onto poor quality gravel road

PACKAGE TYPE

- Single-day tour site

MARKET ASSESSMENT

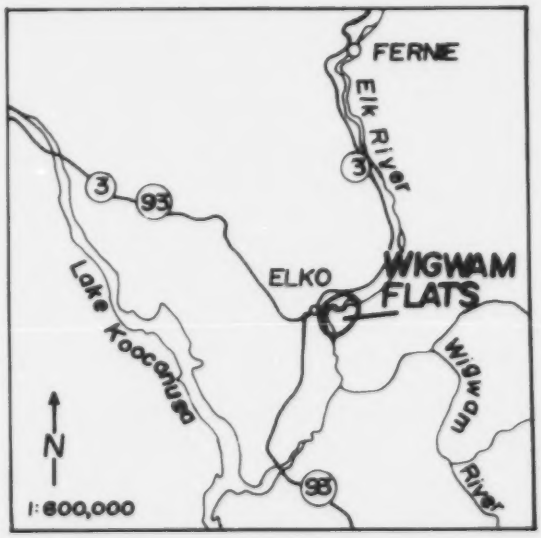
- Appeal : residents and nonresidents
  : primary and secondary (committed, expert)
- One of the best sites for viewing together Rocky Mountain bighorn sheep, Rocky Mountain elk, mule deer and whitetail deer

DEVELOPMENT PRESCRIPTIONS

- Guided trips on foot or skis
- Need for highway pull-out with interpretive signs across the river; spotting scopes might be installed at this look-out

MANAGEMENT ISSUES

- Guide accompaniment required to ensure animal behaviour is not disturbed; special concern for Rocky Mountain elk
- Limited entry viewing site
- Regulate and license operators



Demonstration Site Prescription Summary

HEIGHT OF THE ROCKIES

PRODUCT TYPE

- Backcountry; montane wildlife, grizzly bear

PRODUCT DESCRIPTION

- Location: approximately 85 km. north of Sparwood in the upper Elk Valley on the British Columbia-Alberta border.
- Viewing species/seasons: mountain goat, Rocky Mountain bighorn sheep (all year); mule deer, whitetail deer, Rocky Mountain elk (Mar-Oct); grizzly bear (May-Nov)
- Viewing opportunities: dispersed (large herds of big game)
- Secondary attraction: alpine landscape, scenic mountains
- Existing access/facilities: good gravel road leads to backcountry trails

PACKAGE TYPE

- Backcountry touring by horse and/or foot

MARKET ASSESSMENT

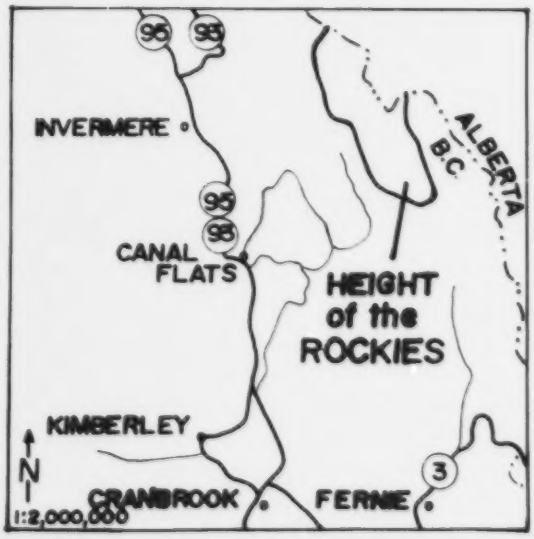
- Appeal : residents and nonresidents
  (international)
  : primary (adventure travel)
- World class wildlife viewing wilderness area
- Highest density of mountain goats in the world
- Highest density of grizzly bear in interior British Columbia
- Access links to Kananaskas Wilderness, Elk Lakes Provincial Park and Banff National Park

DEVELOPMENT PRESCRIPTIONS

- Identify and develop trailhead accommodation
- Identify most reliable sheep, goat and elk locations to minimize impacts on animal behavior

MANAGEMENT ISSUES

- Significant expansion potential for guided trips
- Consider guide accompaniment to ensure environmental protection and visitor safety
- Site carrying capacity needs to be established
- Protect sensitive wilderness and alpine values



Demonstration Site Prescription Summary

JUNCTION

PRODUCT TYPE

- Midcountry; montane wildlife

PRODUCT DESCRIPTION

- Location: confluence of Chilcotin and Fraser Rivers, approximately 85 km. west of 100 Mile House and south of Highway 20
- Viewing species/seasons: California bighorn sheep (all year); long-billed curlew (Apr-July); blue grouse, sharp-tail grouse (all year); raptors (Apr- Sept)
- Viewing opportunities: dispersed (sheep); focused (grouse)
- Secondary attraction: dry grassland habitat
- Existing access/facilities: good gravel road leads to poor quality gravel road

PACKAGE TYPE

- Single-day trip
- Site in a Chilcotin multiday tour

MARKET ASSESSMENT

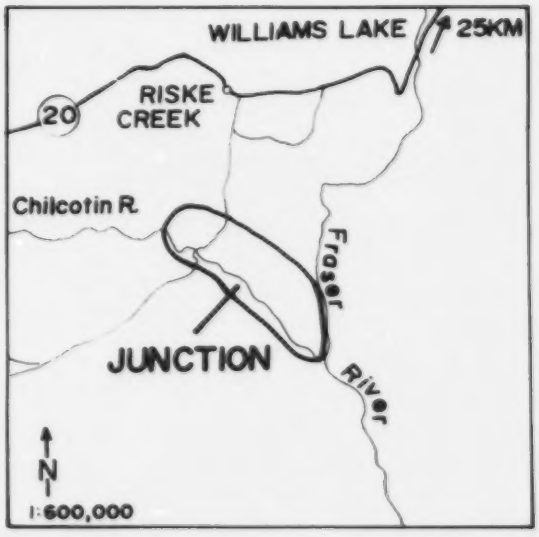
- Appeal : residents and nonresidents
  : secondary and primary (general touring, outdoor interest)
- Prime opportunities to observe California bighorn sheep

DEVELOPMENT PRESCRIPTIONS

- Identification of viewing locations
- Interpretation signs required at main viewing lookouts

MANAGEMENT ISSUES

- Vehicle access management plan required to minimize habitat disturbance



Demonstration Site Prescription Summary

BOWRON SLOUGH

PRODUCT TYPE

- Midcountry; waterfowl, shorebirds, songbirds, raptors, montane wildlife

PRODUCT DESCRIPTION

- Location: northwest section of Bowron Lake Provincial Park, about 90 km. east of Quesnel
- Viewing species/seasons: waterfowl, shorebirds, songbirds, raptors (May- Oct); moose, grizzly bear, beaver, muskrat, Canadian river otter (May-Oct)
- Viewing opportunities: focused (bird species) dispersed (mammal species)
- Secondary attraction: lakes
- Existing access/facilities: paved road to water, then boat/canoe access

PACKAGE TYPE

- Single-day tour site by boat
- A site in a multiday tour package

MARKET ASSESSMENT

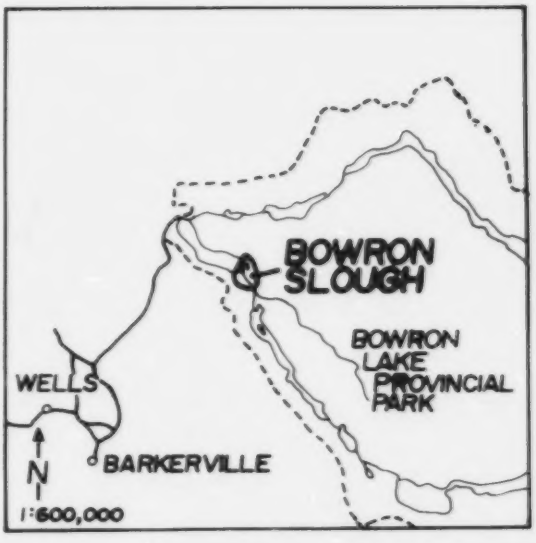
- Appeal : residents and nonresidents
  : primary and secondary (committed)
- Good viewing opportunities from canoe
- Easy introduction to wildlife viewing activities for secondary outdoor recreationists

DEVELOPMENT PRESCRIPTIONS

- Need for interpretive centre, signs, viewing towers and platforms, and brochures

MANAGEMENT ISSUES

- May require additional staff to oversee viewing activities
- Visitor carrying capacity may be a concern
- In order to minimize impact on wildlife, possible restriction of canoe access to some portions of the slough



Demonstration Site Prescription Summary

ILGACHUZ

PRODUCT TYPE

- Backcountry; montane wildlife

PRODUCT DESCRIPTION

- Location: north of Highway 20 about 100 km. east of Bella Coola
- Viewing species/seasons: mountain caribou (June-July, Sept-Nov); grizzly bear, wolf (all year)
- Viewing opportunities: dispersed
- Secondary attraction: volcanic landscape
- Existing access/facilities: good gravel road leads to backpacking trails

PACKAGE TYPE

- Backcountry touring by horse and/or foot

MARKET ASSESSMENT

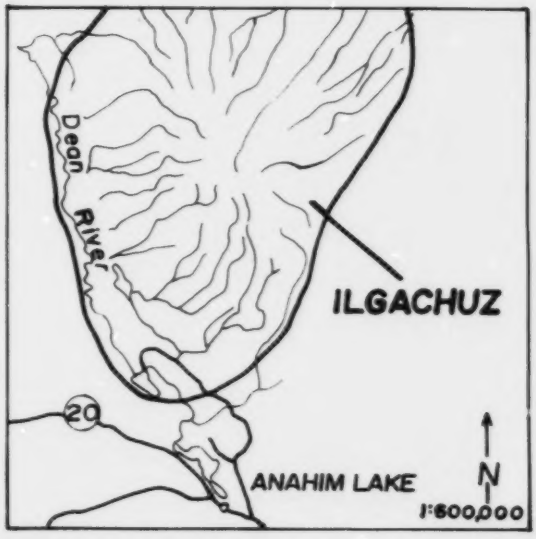
- Appeal : residents and nonresidents
  : primary (adventure travel)
- Prime wilderness opportunity to view caribou in southern British Columbia

DEVELOPMENT PRESCRIPTIONS

- Develop accommodation facilities on the perimeter of the area (private sector involvement possibilities)

MANAGEMENT ISSUES

- Consider guide accompaniment to lessen impact on wildlife.
- Site carrying capacity needs to be established
- Protect sensitive and wilderness alpine value



Demonstration Site Prescription Summary

TELKWA MOUNTAINS

PRODUCT TYPE

- Midcountry; montane wildlife

PRODUCT DESCRIPTION

- Location: approximately 30 km. south of Smithers between Howson, Goathorn, Houston Tommy Creeks and the Thautil River
- Viewing species/seasons: mountain caribou, mountain goat (all year)
- Viewing opportunities: dispersed
- Secondary attraction: mountain landscape
- Existing access/facilities: seasonal 4 wheel drive access or backpacking

PACKAGE TYPE

- Single-day tour site from Smithers
- Multiday tour site on horseback

MARKET ASSESSMENT

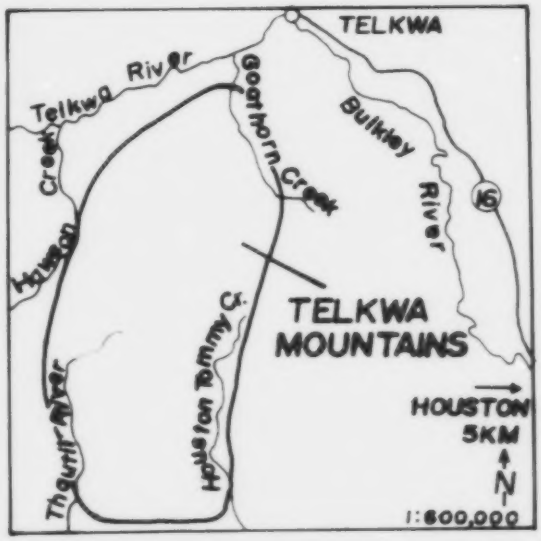
- Appeal : residents
  : primary (casual, committed)

DEVELOPMENT PRESCRIPTIONS

- Improve road access
- Helicopter access to perimeter of site only
- Private sector opportunities for guided tours on horseback

MANAGEMENT ISSUES

- Regulate air landing sites
- Establish flight viewing guidelines
- Consider ATV closure
- Visitor carrying capacity of concern



Demonstration Site Prescription Summary

SOUTH MORESBY

PRODUCT TYPE

- Backcountry; sea mammals, waterfowl, raptors, seabirds

PRODUCT DESCRIPTION

- Location: east side of Moresby Island in the Queen Charlotte Islands between Selwyn Inlet and Cape St. James
- Viewing species/seasons: horned puffin, Cassin's auklet (May-Aug); seabirds, waterfowl, raptors (mid Apr-Sept); gray whale, harbour seal, Steller sea-lion (May-July)
- Viewing opportunities: focused (puffins at Anthony Island, auklet at Windy Bay, Steller sea-lions at Cape St. James and Reef Island); dispersed (waterfowl, raptors, gray whales)
- Secondary attraction: foreshore and intertidal areas
- Existing access/facilities: boat

PACKAGE TYPE

- Destination site
- Multiday tour package by boat

MARKET ASSESSMENT

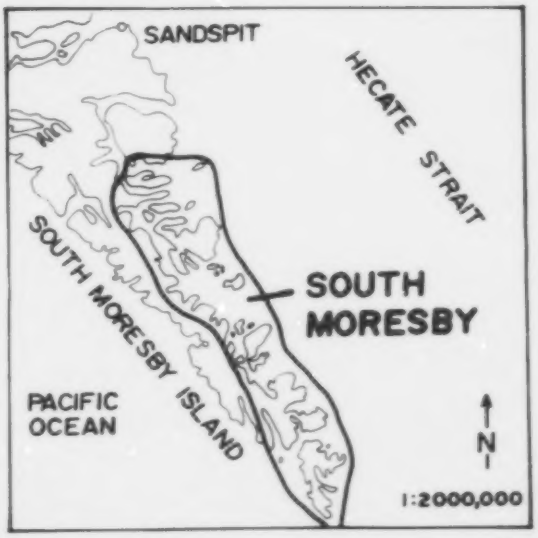
- Appeal : residents and nonresidents (international)
  : primary (committed, expert, adventure travel)
- World class viewing opportunities
- Spectacular mixture of species groups

DEVELOPMENT PRESCRIPTIONS

- Focus accommodation at Sandspit
- Develop small, carefully located wilderness campsite facilities to minimize overall adverse environmental impacts
- Opportunities for private sector involvement

MANAGEMENT ISSUES

- Co-ordination with Environment Canada regarding National Park Reserve
- Ensure integrity of breeding colonies such as at Anthony Island and Windy Bay
- Native land claims require consideration
- Regulate and license operators
- Regulate aircraft and floatplanes landings



Demonstration Site Prescription Summary

SPATSIZI PLATEAU WILDERNESS PARK

PRODUCT TYPE

- Backcountry; montane wildlife, predators

PRODUCT DESCRIPTION

- Location: about 750,000 ha. area between Stikine and Klappen Rivers, about 300 km. north of Terrace
- Viewing species/seasons: Stone sheep, Osborne caribou, mountain goat, grizzly bear, black bear, wolf (mid June-July)
- Viewing opportunities: dispersed
- Secondary attraction: alpine wilderness
- Existing access/facilities: air or backpacking

PACKAGE TYPE

- Backcountry touring by horse and/or foot
- Guide accompaniment tours

MARKET ASSESSMENT

- Appeal : residents and nonresidents (international)
  : primary (adventure travel, expert nature travel)
- Excellent example of expansive Northern interior wilderness

DEVELOPMENT PRESCRIPTIONS

- Develop accommodation facilities on perimeter of the Park (private sector involvement possibilities)

MANAGEMENT ISSUES

- Protect sensitive alpine wilderness values
- Consider guide accompaniment for safety and to minimize impacts to the environment
- Consider limiting the numbers of commercial operators with disperal of use over the area
- Regulate air landing sites
- Evaluate visitor carrying capacity

Demonstration Site Prescription Summary

HANNA-TINTINA

PRODUCT TYPE

- Midcountry; grizzly bear

PRODUCT DESCRIPTION

- Location: off Highway 37, north of Meziadin Lake, about 185 km. north of Terrace
- Viewing species/seasons: grizzly bear (late July-Oct); sockeye salmon (late July-Sept)
- Viewing opportunities: focused (bears consuming spawning salmon)
- Secondary attraction: Meziadin Lake
- Existing access/facilities: paved road

PACKAGE TYPE

- Destination site
- Site in a multiday tour package

MARKET ASSESSMENT

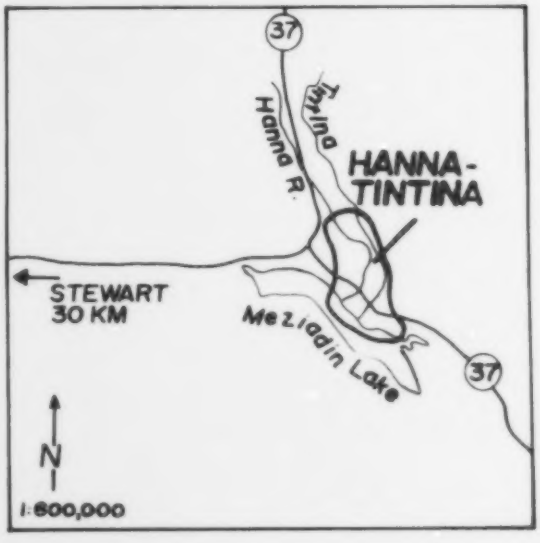
- Appeal : residents and nonresidents
  : primary and secondary
- Outstanding grizzly viewing site

DEVELOPMENT PRESCRIPTIONS

- Need for trails and viewing tower(s)
- Create visual sight lines from viewing tower(s)
- Enhancement of spawning sites

MANAGEMENT ISSUES

- Detailed attention to safety required in planning of facilities and management of viewers
- Ensure separation of viewers from grizzly bears
- Minimize impact on bear behaviour and habitat



Demonstration Site Prescription Summary

CROOKED RIVER

PRODUCT TYPE

- Frontcountry; waterfowl, montane wildlife

PRODUCT DESCRIPTION

- Location: along west wide of Highway 97 from Kelsey lake north to McLeod Lake, about 90 km. north of Prince George
- Viewing species/seasons: moose (late Oct-early Apr); beaver, muskrat, Canadian river otter (all year); trumpeter swan, belted kingfisher, waterfowl (late Oct- early Apr); American dipper, songbirds (May-Sept)
- Viewing opportunities: focused (springs keep water open in winter, good viewing from canoe)
- Secondary attraction: riverine landscape, springs
- Existing access/facilities: paved highway

PACKAGE TYPE

- Site in a single-day tour package from Prince George

MARKET ASSESSMENT

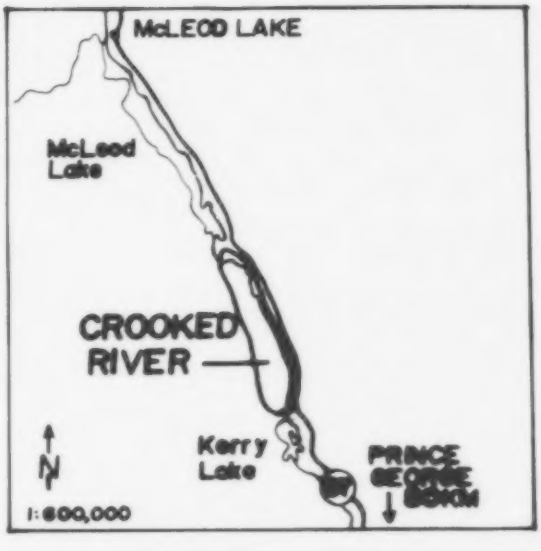
- Appeal : residents (general touring, outdoor interest)
- Year-round moose viewing
- Good viewing from canoe

DEVELOPMENT PRESCRIPTIONS

- Need for interpretive signs, road pull-outs and viewing tower(s)
- Create visual sight lines from viewing tower(s)
- Develop canoe access to river

MANAGEMENT ISSUES

- Control poaching of trumpeter swans
- Manage forest harvesting activities; retain visual integrity of the surrounding area



Demonstration Site Prescription Summary

BOUNDARY LAKE

PRODUCT TYPE

- Frontcountry; waterfowl, shorebirds, mammals

PRODUCT DESCRIPTION

- Location: British Columbia-Alberta border approximately 50 km. east of Fort St. John
- Viewing species/seasons: eared grebe, red-necked grebe, horned grebe, black tern (Apr-Aug); waterfowl, shorebirds, songbirds (Apr-mid Oct); snow goose, white fronted goose, tundra swan, trumpeter swan (Apr, Sept-early Oct); beaver, muskrat (all year)
- Viewing opportunities: focused (grebe and tern colonies; geese and swans in migration; tremendous diversity of songbird species and breeding waterfowl)
- Existing access/facilities: paved and good gravel roads, trails

PACKAGE TYPE

- Single-day tour site

MARKET ASSESSMENT

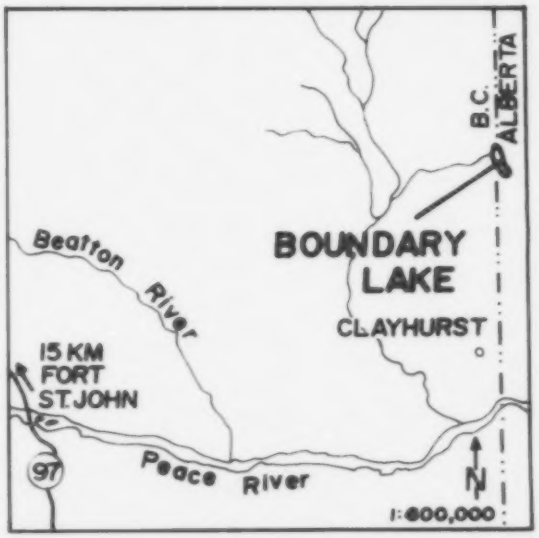
- Appeal : residents
  : primary (committed)
- Diversity of waterfowl and songbird species
- Grebe and tern colonies

DEVELOPMENT PRESCRIPTIONS

- Need for outlet water level control and additional habitat enhancement
- Need for parking, improved foot access and interpretive signs

MANAGEMENT ISSUES

- Integration with petroleum production management
- Consultation with Government of Alberta regarding overall management responsibility
- Integrate viewing with waterfowl hunting



Demonstration Site Prescription Summary

MUNCHO LAKE PROVINCIAL PARK

PRODUCT TYPE

- Frontcountry; montane wildlife

PRODUCT DESCRIPTION

- Location: along the Alaska Highway, about 180 km. west of Fort Nelson
- Viewing species/seasons: Stone sheep, Osborne caribou, moose (all year)
- Viewing opportunities: focused sheep, dispersed (caribou and moose only occasionally viewable at roadside)
- Secondary attraction: Muncho Lake Provincial park
- Existing access/facilities: Alaska Highway

PACKAGE TYPE

- A site in a multiday tour package

MARKET ASSESSMENT

- Appeal : residents and nonresidents
  : secondary (general touring)

DEVELOPMENT PRESCRIPTIONS

- Need for highway pull-outs and interpretive signs

MANAGEMENT ISSUES

- Concern with highway collisions between motorists and wildlife

Demonstration Site Prescription Summary

NORTHEAST ROCKIES

PRODUCT TYPE

- Backcountry; montane wildlife, predators

PRODUCT DESCRIPTION

- Location: about 150 km. northwest of Fort St. John on the divide west of the Alaska Highway; extending northward from the Sikanni River headwaters to the headwaters of the Prophet and Muskwa Rivers
- Viewing species/seasons: Stone sheep, Rocky Mountain elk, mountain goat, grizzly bear, moose, wolf, ptarmigan (all year)
- Viewing opportunities: dispersed
- Secondary attraction: spectacular mountain scenery
- Existing access/facilties: air

PACKAGE TYPE

- Wilderness destination site

MARKET ASSESSMENT

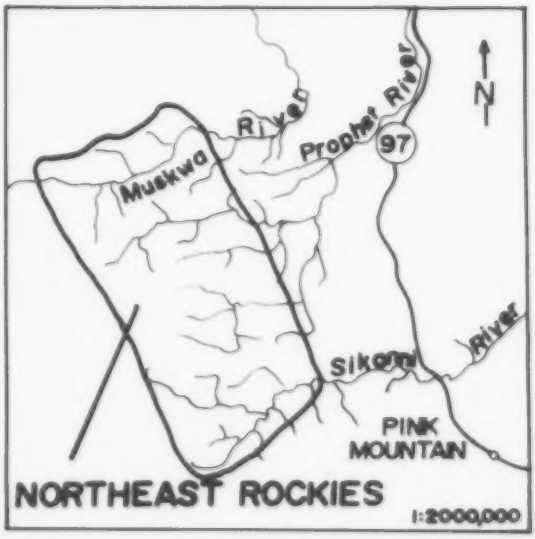
- Appeal : residents and nonresidents (international)
  : primary (committed, expert)
- Combination of wildlife with northern Rockies scenery

DEVELOPMENT PRESCRIPTIONS

- Develop accommodation facilities on the perimeter of the area (private sector involvement possibilities)

MANAGEMENT ISSUES

- Protect sensitive alpine wilderness values
- Consider guide accompaniment for safety and to minimize impacts to the environment
- Consider limiting the number of commercial operators with dispersal of use over the area
- Regulate air landing sites
- Evaluate visitor carrying capacity



Demonstration Tour Prescription Summary

VANCOUVER SINGLE-DAY PACKAGE

PRODUCT TYPE

- Frontcountry; waterfowl, shorebirds, songbirds, raptors, seabirds, sea mammals

PRODUCT DESCRIPTION

- Location: 6 sites, each within two hours driving time or less from Vancouver
- Viewing species/seasons:

  Boundary Bay (Boundary Bay Regional Park, Boundary Bay, Mud Bay, Blackie Spit) waterfowl (Oct-Mar); *seabirds (Oct-Mar); *snowy owl, short-eared owl (mid Nov-late Dec); *shorebirds (mid Apr-May, July-Sept); *raptors (all year); harbour seal (all year):

  Reifel: *waterfowl (all year); *snow goose (Sept-Oct); *raptors (Dec-Feb); songbirds (Apr-Oct):

  Sea/Iona Islands: *waterfowl (Oct-Apr); *shorebirds (Apr-Oct); *raptors (Sept-Apr):

  Squamish Estuary: waterfowl (mid Oct-early Apr); *trumpeter swan (Nov-mid Feb); shorebirds (May-Sept); songbirds (May-June); *bald eagle (mid Nov-Feb); raptors (all year); *seabirds (mid Oct-early Apr); *harbour seal (Sept- Oct):

  Pitt-Addington: (Minnekhada Regional Park, Addington Point Marsh, Pitt Polder); *waterfowl (all year); *trumpeter swan, tundra swan (Nov-Feb); songbirds (May-Aug); *bald eagle (Nov-Feb); raptors (all year); *bull frog (Apr-May):

  Harrison River: waterfowl (Oct-Feb); Shorebirds (Sept-Oct); *trumpeter swan, bald eagle (mid Nov-late Feb); *sockeye salmon, chum salmon, pink salmon (Oct-Nov)

  [* indicates tour package highlight species/groups by site]

- Viewing opportunities: focused at each site
- Secondary attraction: extensive mudflats
- Existing access/facilities: all sites readily accessible by car with dykes or trails for walking

PACKAGE TYPE

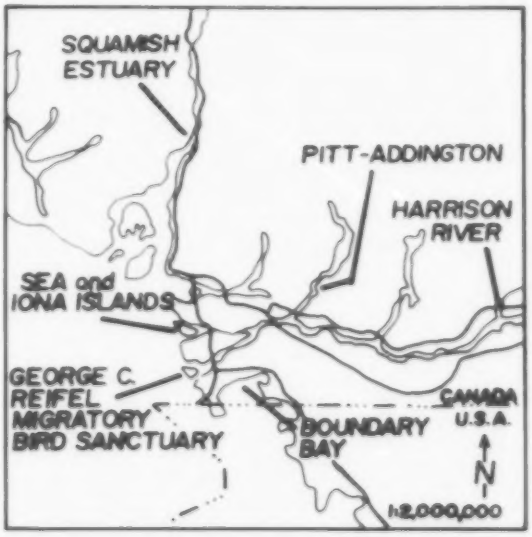
- Appeal : residents and nonresidents (international)
  : primary and secondary (casual, committed, expert)
- Specific package objective: To extend the stay of visitors by several days and to increase visitation year-round by residents. These sites follow a tidal estuaries and mudflats theme, with year-round viewing opportunities
- Easy introduction for new wildlife viewing participants

DEVELOPMENT PRESCRIPTIONS

- Need for tour packaged interpretive brochures, interpretive signs and highway directional signs
- Need for viewing towers, blinds, platforms and boardwalks at each site
- Secure RAMSAR designation for Boundary Bay area

MANAGEMENT ISSUES

- Co-operation and consultation with local governments, community groups, naturalist groups and other interested individuals; also Canadian Wildlife Service and British Columbia Waterfowl Society
- Minimize user impacts on environmentally sensitive mudflats
- Land acquisition required at several sites



Demonstration Tour Prescription Summary

VANCOUVER ISLAND MULTIDAY PACKAGE

PRODUCT TYPE

- Frontcountry; waterfowl, shorebirds, songbirds, raptors, seabirds, sea mammals

PRODUCT DESCRIPTION

- Location: six sites extending from the southern tip of Vancouver Island near Victoria along the east coast to Courtenay
- Viewing species/seasons:

  Race Rocks: *seabirds (all year); *California sea-lion, Steller sea-lion, harbour seal (all year):

  Goldstream Provincial Park: *bald eagle (Oct-Dec); *chum salmon, coho salmon (Oct-Dec):

  Somenos Lake: *waterfowl (all year); songbirds (Apr-Sept):

  Englishman River Estuary: *waterfowl (Oct-Mar);*shorebirds (Oct-Mar);

  Helliwell Provincial Park: *seabirds (Oct-Apr); *pelagic cormorant (Apr-Aug):

  Courtenay River Estuary: *waterfowl (Oct-Mar); *trumpeter swan (Oct-Mar); shorebirds (Oct-Mar) *raptors (all year).

  [* indicates tour package highlight species/groups by site)

- Viewing opportunities: focused at each site
- Secondary attraction: variety of marine habitats
- Existing access/facilities: Race Rocks accessible by boat only; Helliwell Provincial Park accessible by car and ferry; remaining sites readily accessible by car; interpretive programs at Goldstream during salmon spawning

PACKAGE TYPE

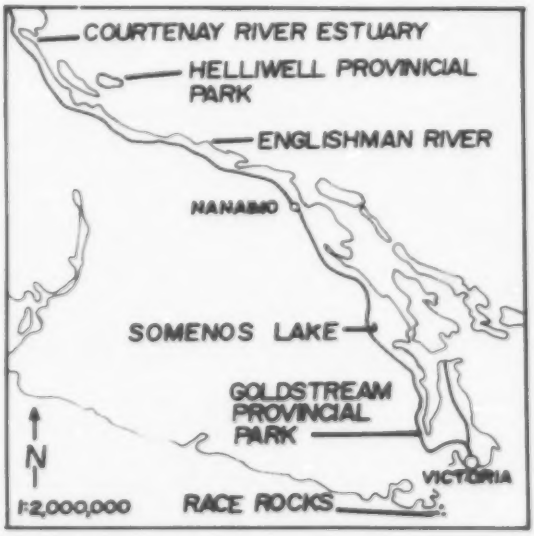
- Appeal : resident and nonresidents
  : primary and secondary (casual, committed, expert)
- Specific package objective: To increase off-season visits by tourists to Vancouver Island. These sites generally follow a marine theme with best viewing opportunities during winter months from October to March
- Relatively easy introduction for new wildlife viewing participants

DEVELOPMENT PRESCRIPTIONS

- Need for interpretive publications, interpretive signs and highway directional signs
- Need for viewing towers, blinds and platforms as well as trail building and upgrading
- Private sector development opportunities for boat tours of Race Rocks

MANAGEMENT ISSUES

- Co-operation and consultation with local governments, community groups, naturalist groups and other interested groups before any development initiated; also Parks Branch of British Columbia Ministry of Environment and Parks
- Consider limiting access to the cormorant colony in Helliwell Provincial Park and to Race Rocks



Demonstration Tour Prescription Summary

SOUTH OKANAGAN SINGLE-DAY PACKAGE

PRODUCT TYPE

- Frontcountry; waterfowl, shorebirds, songbirds, raptors, montane wildlife

PRODUCT DESCRIPTION

- Location: 4 sites situated in a loop between Penticton and Osoyoos in the southern Okanagan.
- Viewing species/seasons:

  White Lake: waterfowl (Apr-May); *sandhill crane (mid Apr); *long-billed curlew (early Apr-early July); *spotted sandpiper, killdeer (May-Aug):

  Vaseux Lake: *California bighorn sheep (Sept-May); *waterfowl (Mar-Apr, Oct-Dec); *tundra swan, trumpeter swan (Oct-Mar); raptors (Mar- Nov); *songbirds (Apr-Sept); *songbirds (Apr-Sept); Western painted turtle, Pacific rattlesnake (May- Aug):

  Osoyoos Oxbows: waterfowl (May-July); *raptors (May-July); *long-billed curlew, catbird (May-July); *bobolink (mid May - mid Aug); *songbirds (May-July); Western painted turtle (May-July); *amphibians (May- June); reptiles (May-Aug):

  Mount Kobau: *brewer's sparrow, hermit thrush, vesper sparrow (May-Aug); *mule deer, mountain goat (all year)

  [* indicates tour package highlight species/groups by site]

- Viewing opportunities: focused at each site
- Secondary attraction: range of habitat types;

  White Lake - sagebrush marsh;
  Vaseux Lake- open rangeland, rocky cliffs, open water, marsh
  Osoyoos Oxbows - river oxbows, woodlands, meadows;
  Mount Kobau - alpine

- Existing access/facilities: all sites readily accessible by car; Mount Kobau road good only in summer months; interpretive signs at Vaseux Lake and Osoyoos Oxbows (at Deadman Lake)

PACKAGE TYPE

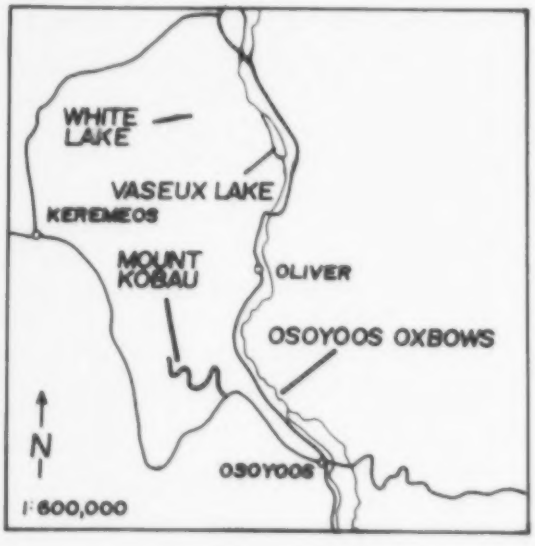
- Appeal : residents and nonresidents
  : primary and secondary (casual, committed, expert)
- Specific package objective: To extend the stay of summer visitors to the South Okanagan by at least one additional day. These sites follow a wildlife/habitat relationships theme with best viewing opportunities during summer
- Easy introduction for new wildlife viewing participants

DEVELOPMENT PRESCRIPTIONS

- Need for interpretive brochures, interpretive signs and highway directional signs
- Need for viewing towers, blinds and platforms at each site

MANAGEMENT ISSUES

- Co-operation and consultation with local governments, community groups, naturalist groups and other interested individuals before development is initiated at any site; also Canadian Wildlife Service
- Possible environmental impacts to the Ecological Reserve situated near Osoyoos Oxbows and potential impacts to species colony establishment



Demonstration Tour Prescription Summary

EAST KOOTENAY MULTIDAY PACKAGE

PRODUCT TYPE

- Frontcountry; montane wildlife, waterfowl

PRODUCT DESCRIPTION

- Location: 6 sites extending from Steeples south east of Cranbrook to the B.C.-Alberta border
- Viewing species/seasons:

  Steeples: Rocky Mountain bighorn sheep (all year); *Rocky Mountain elk (Dec-June); *whitetail deer, mule deer (Dec-May):

  Skookumchuk Prairie: *long-billed curlew (Apr-July); *whitetail deer, mule deer, Rocky Mountain elk (Mar-Apr):

  Premier Ridge: *Rocky Mountain bighorn sheep, Rocky Mountain elk (Dec-mid May); mule deer, whitetail deer (Dec-mid May):

  Columbia Lake: waterfowl (late Sept-Oct); bald eagle, osprey (May-Aug); *Rocky Mountain bighorn sheep (Dec-Apr):

  Wilmer Slough: *waterfowl (Apr-May); *great blue heron (May-July); *Rocky Mountain bighorn sheep (all year); Rocky Mountain elk, mule deer, whitetail deer (all year):

  Kootenay National Park: *Rocky Mountain elk (Nov-Apr); Rocky Mountain bighorn sheep, mountain goat, moose (all year)

  [* indicates tour package highlight species/groups by site]

- Viewing opportunities: focused (Steeples, Skookumchuk Prairie, Premier Ridge, Wilmer Slough); dispersed (Columbia Lake, Kootenay National Park)
- Secondary attraction: spectacular Rocky Mountain scenery
- Existing access/facilities: paved and gravel roads accessible by car; Kootenay National Park facilities and interpretation programs

PACKAGE TYPE

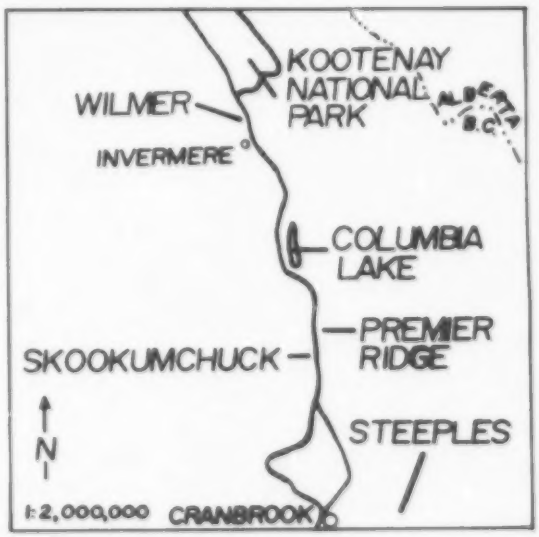
- Appeal : residents and nonresidents
  : primary and secondary (casual, committed, expert)
- Specific package objective: Best opportunity to view large mammals (number, diversity and reliability) with highway access in Canada. Highest land capability for wildlife in Canada and critical winter range. High capability for waterfowl (migratory and nesting)

DEVELOPMENT PRESCRIPTIONS

- Need for interpretive signs generally and interpretive centre at Wilmer Marshes
- Need for developed trails and viewing platforms
- Private sector development of van/bus tours
- Critical site land acquisition warranted

MANAGEMENT ISSUES

- Need to manage viewing to prevent animal stress on winter range and waterfowl stress during nesting
- Involve communities, Canadian Wildlife Service, national Park and provincial agencies in integrated wildlife viewing management approach



Chapter 6

Marketing Approach

This chapter offers the province guidance on how to attract the markets to British Columbia's wildlife viewing products.

To date, wildlife viewing has been marketed in very general ways in association with marketing British Columbia's image as a "Super, Natural" destination. Pictures of whales, various land mammals, and other wildlife have often comprised part of the imagery used to entice visitors. Specific information on where or how to view wildlife has not been made available however, and little formal contact has been made between those that manage wildlife resources and the land they inhabit, and those that promote British Columbia as a desirable tourist destination.

Wildlife viewing is only one of several closely related tourism values associated with the quality of the natural environment. Adventure travel markets are extremely complex, and our present understanding of the motivations of participants in specific segments, such as wildlife viewing, is low. Therefore, to develop an objective marketing program requires two levels of effort:

1. In the long term, government must identify and implement a fundamental strategy that will reach both the primary and secondary participation markets.

2. In the short term, government and industry must begin an initial wildlife viewing marketing campaign to achieve an increase in this kind of tourism.

GENERAL MARKETING STRATEGY

The goals of a general wildlife viewing strategy should be as follows:

1. To encourage resident, primary participants to take more frequent wildlife viewing trips and to explore opportunities in the frontcountry, midcountry and backcountry zones to a greater extent.

2. To encourage out-of-province visitors to participate in self-guided and guided tour packages and destination packages in the front and midcountry zones.

3. To encourage nonresident, adventure-oriented travellers to purchase guided backcountry nature-observation packages.

4. To increase the length of stay in the province or in a specific region by encouraging travellers to visit wildlife viewing sites.

5. To increase the average expenditures by causing travellers, in staying longer, to purchase additional meals, nights of accommodation, and other goods.

6. To increase the general level of interest in taking vacations in British Columbia by offering wildlife viewing opportunities as additional "things to do and see."

7. To promote viewing in a fashion consistent with conservation of wildlife resources.

STRATEGIC ACTIONS

The actions needed to achieve the general marketing strategy goals can be divided into those that increase primary participation and those that increase secondary participation.

Primary Participation Marketing Actions

1. Increase awareness of wildlife viewing and nature observation opportunities within British Columbia, and increase the awareness and availability of packages by:

   - promoting nature observation as part of the adventure travel industry;
   - visiting wildlife viewing sites and areas with representatives of major specialty magazines (eg. Sierra Club, Natural History, Audubon, Equinox), tour operators (Sobek, Questers, etc.), travel publications and newsletters, and internationally known naturalists and conservationists;
   - organizing speaking tours and presentations through naturalist and conservation clubs and societies, and in cooperation with university extension departments;
   - informing education institutions about available educational opportunities for children and university students;
   - organizing photographic competitions for professional and amateur wildlife photographers within the province;
   - increasing coverage of British Columbia's wildlife on television and in film by coordinating efforts with the Film Development Branch and by sponsoring celebrities on outings in the province;
   - undertaking direct mail campaigns;
   - encouraging and assisting partners, such as the Federation of B.C. Naturalists, to produce a full-colour, large-format guidebook to wildlife viewing, to be sold for profit with any net proceeds being dedicated to wildlife-related management;
   - producing brochures identifying significant viewing opportunities and self-guided tours to mail to subscribers of wildlife-related magazines.

2. Increase the quality of information available about wildlife viewing and nature observation opportunities. Specifically, the province's Adventure Travel Guide should contain more site-specific information related to wildlife viewing as well as more details about packages available to the consumer. In addition, government should examine the feasibility of producing a catalogue of nature observation packages that could be inserted into this Adventure Travel Guide.

3. Undertake proactive marketing to encourage the private sector to develop single-day and multiday tour packages. Specifically, work with existing and new tour companies to design a wide variety of wildlife viewing tour packages and ensure that this information is available to the private sector. Compile a data base of potential resource people, such as naturalists, biologists, and ornithologists, who would be prepared to act as tour guides or to train guides for the industry.

Secondary Participation Marketing Actions

Secondary participation marketing actions have two main purposes: first, to increase awareness of wildlife viewing as a viable and attractive activity for travellers in British Columbia and second, to provide information directing travellers to those sites where wildlife viewing is reliable.

1. Include wildlife viewing sites on provincial road maps, along with a brief description of species and seasons.

2. Include the major frontcountry and midcountry viewing sites in the Ministry of Tourism, Recreation and Culture's Travel Planner, along with sufficient information about each site for the target audience.

3. Prepare an attractively designed, relatively inexpensive, informative booklet similar to Oregon's "Watchable Wildlife" publication. There could be a series of such booklets, one for each region. Information should include

brief site descriptions, viewable species, best viewing seasons, and appropriate wildlife viewing behaviour. Suggested travel itineraries and route plans might also be included.

4. Educate the travel industry, particularly the staff of regional tourist associations and travel information centres, regarding the availability of wildlife viewing opportunities.

5. Identify bus tour operators who might be interested in including wildlife viewing sites in their itineraries, and provide them with information to get to the view area and to inform their passengers about the sites.

6. A portable wildlife viewing exhibit should be developed by the Ministry of Tourism, Recreation and Culture for use at consumer and trade shows. This exhibit would feature the prime wildlife viewing opportunities, products, and package types available.

7. The message about wildlife abundance, diversity, and viewability should be incorporated into the "Super, Natural" marketing theme.

Budget Allocation

In terms of economic impact, the primary participation markets are the most significant. Thus, approximately two-thirds of any marketing budget should be allocated towards encouraging participation from these markets. Of this, the priority target market should be those nonresidents who would be inclined to come from Alberta, Washington, Oregon, California, northeastern United States, and Ontario to view wildlife in British Columbia.

Approximately a third (33%) of the marketing budget should be allocated to the secondary participation markets, with greatest emphasis going to the nonresident segment.

INITIAL MARKETING CAMPAIGN

To initiate marketing of British Columbia's wildlife viewing resource, we propose a campaign that will achieve the greatest increase in visitor participation for the marketing dollars spent. This is done by pursuing the primary expert market, especially naturalists, outdoor photographers, and birdwatchers.

These particular market segments have been targeted because they are relatively easy to access through specialty magazines, clubs and associations, and travel intermediaries (wholesalers and agents) who specialize in selling to these markets.

In the short term, the proposed wildlife viewing marketing campaign will appeal to the following geographically distinct target markets, which are known to have an interest in British Columbia's wildlife viewing products:

- residents of British Columbia
- residents of Alberta, Washington, and Oregon
- residents of southern Ontario and California

This wildlife viewing campaign will be comprised of a set of specific programs:

Consumer Magazines

An advertising program in consumer magazines should be designed to:

- gain awareness in the targeted markets by advertising in appropriate nature/conservation North American magazines.
- piggy back onto the British Columbia tourism generic advertising campaign already being conducted in specific magazines
- provide advertising that is both product and operator-specific

Priority consumer magazines and proposed annual costs are as follows:

Nature Canada	$ 4,600
Seasons	2,400
Sierra	6,000
Real Travel	6,000
Canadian Geographic	4,000
Birdwatcher	8,000
Outside	4,000
Equinox	6,000
Outdoor Photographer	10,000
B.C. Adventure Guide	5,000
TOTAL COST:	$ 56,000

Other magazines could be considered in subsequent years. However, because of the high costs involved, they should be used only when more product has been established.

Product Brochures

The government should assist new operators in producing brochures that define their product. Approximately 10,000 brochures with price lists should be printed for the estimated 10 new operators.

Costs

The cost of brochures for 10 operators at $10,000 each = $100,000. Assistance should be 50% or $50,000.

TOTAL COST:	$50,000

Wildlife Viewing Directory

A wildlife viewing directory would:

- promote overall viewing opportunities in British Columbia
- publicize individual operator products and prices
- reinforce the image of British Columbia as a destination for those interested in wildlife observation
- generate specific product inquiries

The directory should be designed so that it could be inserted into the British Columbia Adventure Tourism Guide as well as stand on its own.

Description

8½ x 11, 8 page, full colour

Partial cost recovery through advertising by suppliers, airlines and operators

Highlight certain British Columbia features including:

- whale watching
- alpine big game
- waterfowl migrations

75,000 copies for a two-year supply.

Distribution

Inquiry fulfillment	30,000
Mail out to naturalists	20,000
Consumer shows	10,000
Wholesalers and agents	10,000
Government Information Centres	5,000

Costs

Design and printing	$ 60,000
Cost recovery (through advertising)	- 30,000
TOTAL COST:	$ 30,000

Speaking Engagements

Speakers would be identified in geographically targeted areas to make presentations to a variety of nature oriented groups and associations, including:

- provincial and regional naturalist organizations (e.g. Audubon Society, Federation of Ontario Naturalists)
- provincial and regional Wildlife organizations (e.g. B.C. Wildlife Federation)
- provincial and regional conservation organizations (e.g. Sierra Club)

Speakers will make presentations in:

Toronto (10 presentations)
Edmonton (5 presentations)
Calgary (5 presentations)
Seattle (5 presentations)
Portland (3 presentations)
San Francisco (5 presentations)
Los Angeles (7 presentations)

Costs

Slide and text preparation	$ 5,000
40 presentations @ $500 each	20,000
TOTAL COST:	$ 25,000

Tour Operator Familiarization Tours

The emphasis of this program will be on high-profile species such as whales, grizzly bears, and Dall sheep. Its purpose is to introduce new products to existing and potential travel wholesalers.

Costs

Sobek expeditions	$ 3,000
Ecosummer	1,500
Victor Emmanuel Photo Safaris	3,000
TOTAL COST:	$7,500

Consumer Travel Shows

British Columbia should participate in selected travel shows to introduce new products directly to the appropriate consumer, generate trip deposits, increase overall awareness of the province's wildlife viewing products, and reinforce the profile of existing products.

Description and Costs

Anaheim Sportsman Show

- 250,000 visitors
- adventure travel consumers
- cost: $ 5,000

Toronto Sportsman Show

- 300,000 visitors
- adventure travel consumers
- cost: $ 5,000

TOTAL COST:	$ 10,000

Travel Writer Sponsorships

The programs would be designed to obtain maximum exposure in nature-oriented magazines and to highlight specific features and operators.

Description and costs

Nature Canada	$ 2,000
Canadian Geographic	2,000
Birdwatcher	3,000
Real Travel	2,000
TOTAL COST:	$ 9,000

Costs would, where possible, be shared with individual operators and possibly with federal travel writer programs.

Video Productions

Videos provide a flexible and exciting sales tool that could be distributed inexpensively to organizations, used on speaking engagements and at travel shows, and used to reinforce sales calls made by individual operators to travel wholesalers and agents.

At least 2 videos should be produced, emphasizing British Columbia's marine and mountain environments, respectively.

Description

- 13 minutes in length
- destination and product specific
- related to overall theme of the wildlife viewing campaign

Costs

Production (2 x $20,000)	$ 40,000
Advertiser contributions	-10,000
TOTAL COST:	$ 30,000

Inquiry Fulfillment

It will be important to be able to respond immediately to general and specific requests for information. This could be achieved by having packages available at Tourism British Columbia offices and possibly at the offices of appropriate organizations (e.g. Wilderness Tourism Council, Outdoor Recreation Council).

Description

The packages would include a directory, product-specific brochures, and perhaps a welcome letter by a well-known British Columbian naturalist.

TOTAL COST:	$20,000

Mailing List

A suitable organization (e.g. Wilderness Tourism Council, Outdoor Recreation Council) could be responsible for developing a comprehensive mailing list that would include:

- nature/conservation oriented media
- travel writers
- retail agents
- tour wholesalers
- nature/conservation clubs and associations

Description

The mail list would be updated 2 to 3 times per year, with regular mailings undertaken on a seasonal (winter-summer) basis. The mailings would emphasize the three geographically targeted markets.

Costs

Set-up cost	$ 10,000

In-depth Marketing Study

To adequately address the components of the marketing strategy, further basic research will need to be conducted. It should:

- sample wildlife viewing tourists using a questionnaire to determine participant product preferences, socioeconomic characteristics, etc.
- review wholesalers
- review all pertinent consumer magazines
- acquire trade show profiles
- design and cost in detail a promotional campaign

Costs $ 25,000

PROPOSED MARKETING CAMPAIGN BUDGET

Consumer Magazines	$ 56,000
Product Brochures	50,000
Wildlife Viewing Directory	30,000
Speaking Engagements	25,000
Familiarization Tours	7,500
Consumer Travel Shows	10,000
Travel Writers Sponsorships	9,000
Video Production	30,000
Inquiry Fulfillment	20,000
Mailing List	10,000
In-depth Marketing Study	25,000
TOTAL CAMPAIGN COST	**$ 272,500**

Chapter 7

Recommendations

The following recommendations are made in order to best develop the potential of British Columbia's wildlife viewing resource:

1. Wildlife-viewing tourism must be developed in a fashion that generates economic benefits while also protecting environmental values.

2. Policy on wildlife viewing management needs to be formulated and adopted by government. The Wildlife Branch should prepare a policy paper based on the information provided in this report as well as further information acquired from the commercial sector and key citizens groups and individuals.

3. To implement this policy, government must establish the capability to manage wildlife viewing tourism to ensure that the quality of the resource will be retained while the potential of the sector is developed. This implies provision of adequate budget and staffing as well as the development and delivery of appropriate regulations and programs.

4. A wildlife viewing systems plan should be prepared to ensure that economic development and environmental protection objectives will be simultaneously achieved.

5. Public and private sector roles should be defined so that the emphasis in government is on resource management, commercial sector support, and generic marketing; and the emphasis in the private sector is on development, delivery, and marketing of specific wildlife viewing packages.

6. To assist in financing new commercial wildlife viewing operations, the minimum funding threshold under the ERDA Tourism Subagreement should be reduced to $20,000.

7. The site information associated with the inventory process, particularly for the choice 51 and other sites proposed for development, should be further detailed and field verified.

8. The Wildlife Branch should undertake detailed environmental research on site sensitivity, site carrying capacity and techniques for managing wildlife viewing impacts.

9. The activities of other land-based users (e.g. forestry, mining) should be administered by government to ensure that important wildlife viewing values are not eroded.

10. The Wildlife Branch should use the Wildlife Management Area status to manage lands associated with especially important wildlife viewing sites.

11. The requirements for, and the policy associated with, wildlife viewing and consumptive wildlife use should be integrated.

12. Government should develop a system for licensing commercial wildlife viewing operators. This should address such issues as residency requirements, fees, tenure, and the role of existing operators.

13. Government and the private sector should develop and implement techniques to ensure the safety of wildlife viewers.

14. Educational and information materials, including brochures, signs, naturalist programs, and interpretive centres, should be developed to enhance the quality of British Columbia's wildlife viewing products.

15. The proposed initial wildlife viewing tourism marketing campaign should be implemented.

16. Further research should be undertaken to provide in-depth detail on wildlife viewing market segments.

Appendix A

Contact List

INDIVIDUALS AND ASSOCIATIONS INTERVIEWED OR CONSULTED

DURING THE COURSE OF THE STUDY

Aberlie, Doug	Village of Hazelton	Hazelton
Alta. Fish & Wildlife	Province of Alberta	Edmonton, Alb.
Barnett, Ian	Ducks Unlimited Canada	Kamloops
Beland, Greg	Parks Canada	Calgary, Alb.
Bondi, S.	Inter-Island Excursions	Tofino
Brooks, Al	Comox-Strathcona Naturalists	Black Creek
Bullock, Don	Guide Outfitter	Creston
Burgess, Tom	Wildlife Branch MoEP	Surrey
Bustard, Dave	Consultant	Smithers
Caldwell, Don	Guide Outfitters Association	100 Mile House
Cannings, Syd	Vanc. Nat. History Society	Vancouver
Child, Ken	Wildlife Branch MoEP	Prince George
Chow, Sharon	Sierra Club of West. Canada	Victoria
Clague, Pierce	Babine River Lodge	Smithers
Collingwood, Ray	Guide Outfitter	Smithers
Corbould, Mr.	Tweedsmuir Lodge	Bella Coola
Davies, Rick	Wildlife Branch MoEP	Nanaimo
Demarchi, Ray	Wildlife Branch MoEP	Cranbrook
Downey, Bruce	Planning Consultant, Yukon & NWT	Victoria
Dubois, Bill	Guide Outfitter	Invermere
Dyer, Oroville	Wildlife Branch MoEP	Penticton
Eagles, Paul	University of Waterloo	Waterloo, Ont.
Edie, Alan	Wildlife Branch MoEP	Smithers
Erickson, Wayne	Fed. of B.C. Naturalists	Prince George
Ferris, Wayne	East Kootenay Wildlife Association	Fernie
Foster, Bristol	Independent Biologist	Ganges
Fox, Irving	Resource Economist	Smithers
Fox, Rosemary	Sierra Club	Smithers
Garrard, Marg	Garrard & Sons Guide Outfitters	Gold Bridge
Gough, Don	Parks Branch MoEP	Williams Lake
Grass, Jude	Fed. of B.C. Naturalists	Burnaby
Hamilton, Cliff	Oregon Dept. of F & W.	Portland
Harper, Fred	Wildlife Branch MoEP	Fort St. John
Harvey, Lloyd	Guide Outfitter	Cranbrook
Hatter, Dave	Consultant	Smithers
Hazelwood, Grant	B.C. Wildlife Federation	Terrace

Heathman, Rick	Parks Branch MoEP	Prince George
Hebert, Daryl	Wildlife Branch MoEP	Williams Lake
Henderson, Bob	Guide Outfitter	Smithers
Hennan, Ed	Ducks Unlimited Canada	Kamloops
Hopkins, James	Parks Branch MoEP	Prince George
Howie, Rick	Wildlife Branch MoEP	Kamloops
Hughes, Geoff	Alaska Dept. of Fish & Game	Fairbanks, Alaska
Jamieson, Bob	Guide Outfitter	Kimberley
Janz, Doug	Wildlife Branch MoEP	Nanaimo
Johnson, Don	Fed. of B.C. Naturalists	Fort St. John
Jury, Doug	Wildlife Branch MoEP	Kamloops
Karup, Tony	Bella Coola Nature Club	Bella Coola
Keller, Doyle	Wildlife Branch MoEP	Fort St. John
Law, Laird	Prince George Ramblers	Prince George
Low, David	Wildlife Branch MoEP	Kamloops
Mackay, Dennis	Stubbs Island Charters	Telegraph Cove
Manager	Cdn. Princess Tours Ltd.	Uclulet
Mankelow, Ed	Cowichan Valley Naturalists	Chemainus
Merchek, Ed	U.S. Fish & Wildlife Service	Portland, Ore.
Meredith, Greg	North by Northwest Tourism	Smithers
Merrilees, Bill	Parks Branch MoEP	North Vancouver
Moss, Pat	Save the Bulkley	Smithers
Neave, Roly	Wells Gray Tours Ltd.	Kamloops
Ohanjanian, Penny	Rocky Mountain Naturalists	Kimberley
Purdy, Bob	Creston Wildlife Centre	Creston
Purdy, Carmen	East Kootenay Wildlife Association	Kimberley
Reeder, Stu	B.C. Wildlife Federation	Victoria
Rhodes, Alex	Sea Coast Expeditions	Victoria
Pojar, Rosamunde	Bulkley Valley Naturalists	Smithers
Roberts, Anna	**Ministry of Forests**	Williams Lake
Ross, Gail	**Parks Branch MoEP**	Prince George
Scheer, Bob	Parks Branch MoEP	Kamloops
Scott, Barry	Guide Outfitter	Jaffray
Siddle, Chris	Fed. of B.C. Naturalists	Fort St. John
Simmons, Rick	Parks Branch MoEP	North Vancouver
Stace-Smith, Dick	Fed. of B.C. Naturalists	Vancouver
Steventon, Doug	Wildlife Branch MoEP	Smithers
Stirling, Dave	Fed. of B.C. Naturalists	Victoria
Strauss-Walters, Anna	Wildlife Branch MoEP	Cranbrook
Tegart, Cody	Guide Outfitter	Invermere
Tranfield, Pauline	Arrowsmith Naturalists	Parksville
Vickerman, Sara	Defenders of Wildlife	Portland, Ore.
Wash. Wildlife Branch	State of Washington	Seattle, Wash.
Watts, Sid	Cowichan Valley Naturalists	Duncan
Wilson, Don	Fed. of B.C. Naturalists	Prince George
Youds, John	Wildlife Branch MoEP	Williams Lake

Appendix B

Sample Interview Form

WILDLIFE VIEWING OPPORTUNITY – BIOPHYSICAL DESCRIPTION

1:50,000
NTS Sheet_____ Region_____ Site/ Area No. _____

Local Name Title:_____
Location Description

Land Status/Jurisdiction_____
Viewing Species (incl. Season ie. early, mid, late - month)

Focused or Dispersed Resource _____

Special Viewing Characteristics

Habitat Description

Associated Secondary Natural Features

Site/Area Environmental Sensitivity

Existing Access/Facilities/Educational Programs:

Management Considerations Comments

Location Sketch Map (optional) Comments

Interview Source_____Date_____

_____Interviewer

Appendix C

Interest in Wildlife Species

Interest in Wildlife Species
British Columbia Residents, 1983
(Numbers in Brackets are Percentages of Provincial Population
19 Years of Age and Over)

	SPECIES	SPECIES MOST INTERESTED IN	GREAT INTEREST	SOME INTEREST
1.	Bear	66,800 (3.3)	289,300 (14.4)	100,300 (49.7)
2.	Deer, Elk, Moose	315,200 (15.7)	615,600 (30.6)	960,800 (47.8)
3.	Mountain Goat, Mountain Sheep, Caribou	53,200 (2.6)	461,900 23.0)	963,900 (47.9)
4.	Wolf, Cougar, Coyote	59,400 (3.0)	373,200 (18.6)	805,300 (40.0)
5.	Waterfowl	179,600 (8.9)	647,000 (32.2)	964,700 (48.0)
6.	Raptors	140,400 (7.0)	594,900 (29.6)	873,500 (43.4)
7.	Songbirds	262,900 (13.1)	697,500 (34.7)	883,500 (43.9)
8.	Other Birds	176,000 (8.8)	450,800 (22.4)	1,040,400 (51.7)
9.	Small Mammals	55,500 (2.8)	463,500 (23.0)	1,069,000 (53.1)
10.	Sea Mammals	352,100 (17.5)	707,700 (35.2)	821,400 (40.8)
11.	Reptiles, Amphibians	9,800 (0.5)	170,900 (8.5)	818,600 (40.7)
12.	Endangered Species	150,300 (7.5)	756,100 (37.6)	781,700 (38.9)
13.	Other	103,800 (5.2)	51,300 (2.6)	48,400 (2.4)
14.	All Wildlife	86,500 (4.3)	N/A	N/A

(Reid *et al.*, 1986)

Appendix D

Market Analysis Methodology

The Resident, Primary Participant Market

Immediate Market Size. The Ministry of Environment has found that 23.5% of the adult British Columbian population were primary participants in wildlife viewing in 1983. If we use the 1987 adult population base*, this means that currently 505,250 residents participate in wildlife viewing as a primary activity.

These adults are estimated to each spend annually 18.1 days (Reid *et al.*, 1986) enjoying the activity, for a total of 9.14 million days of primary wildlife participation. It is very important to remember that not all are participating as tourists during all of their activity days; rather this figure suggests the size of the market that would be interested in wildlife viewing tourism with British Columbia.

Due to a lack of detailed wildlife viewing tourism marketing data, more specific motivations and desires, relative to specific product and package types are unknown at this time. Additional research is necessary.

Market Growth Potential. The Ministry of Environment has examined future resident interest in a broad range of wildlife-related activities (Reid *et al.*, 1986). This data includes primary and secondary as well as residential and nonresidential participation. Of the sixteen categories included in the study, "watch wildlife" is closest to this study's interest.

In 1983, 1,420,800 residents watched wildlife at home and on outings within, and outside, British Columbia. The number of residents with a *future interest* in watching wildlife is recorded at 1,872,700, 30% greater than the present market. Given the estimated 1987 adult population of 2.15 million and assuming the market has potential to grow 30% greater than the present market, this market segment could grow to 657,000 participants.

It is assumed that people who express a future interest in viewing wildlife are probably future *casual, primary participants*. What is required to make them *actual* participants are products and packages that will stimulate their interest. Whale watching is an excellent example of the development of a product and packaging that entices new, casual primary participants into wildlife viewing.

To estimate the potential for expanding this market (in participant-days), we assumed that 23.5% of the adult population will continue to commit an average of 18.1 days per person to wildlife viewing. Potential *additional* casual participants may commit fewer days. To be conservative, 3 days of participation per person are assumed. Thus, the potential adult resident market is calculated as

* The 1987 B.C. adult population has been estimated using Statistics Canada's 1986 census information for age classes 20 and over, plus 20% of the age class 15-19 years (to obtain an estimate of those of 19 years of age), times a growth rate of 1% per year.

follows:

(23.5% x 2.15 million) x 18.1 days, plus 30% x (23.5% x 2.15 million) x 3 days.

This calculation indicates that the resident, primary market could grow to 9.6 million days. How much of this will have a tourism significance will depend largely on the provision and marketing of products and packages of interest to residents.

The Ministry of Environment has established that, on average, primary participants spend $47.41 per day (Reid *et al.*, 1986). Therefore, their 1987 expenditures are estimated at $433.6 million, and the *future* market size could generate expenditures totalling $455 million annually. These numbers would expand as greater numbers of residents participate as tourists, travelling away from their regions of residence to view wildlife.

The Resident, Secondary Participation Market

Immediate Market Size. Based on 1983 research, 64.6% of the resident adult population participate in wildlife viewing as a secondary activity. In 1983, this amounted to 1.3 million participants and 107 million days, or an average of 82.5 days per participant (Reid *et al.*, 1986). Using the estimated 1987 resident adult population of 2.15 million, this amounts to 1.39 million secondary adult participants and 114 million days. The number of days, however, is deceptive because they are not solely dedicated to wildlife viewing.

This figure shows the present size of the resident market for wildlife viewing tourism, but it does not indicate how many of these participants would leave their region of residence to tour other regions.

Of this secondary participation market, 93.9% feel that viewing wildlife somewhat increases enjoyment. About two-thirds (63.6%) feel that viewing wildlife *considerably* increases enjoyment (Reid *et al.*, 1986). The latter figure is significant because these people may, in future, be motivated to become primary participants.

Market Growth Potential . There is significant potential for growth in the secondary participation market. Seventy-seven and one-half percent of adults read books about wildlife, 90% watch wildlife-oriented films (Reid *et al.*, 1986), and many presently watch birds and small mammals near home. Many of these could become secondary participants in wildlife viewing away from home. Using the above figures on the market size at present and assuming that this size could be expanded by 30%, the future market for secondary wildlife viewing could expand to *1.8 million adults.*

The Nonresident, Primary Participant

Immediate Market Size. According to the U.S. Fish and Wildlife Service and the Canadian Wildlife Service, nearly 32 million North Americans take at least one trip per year at least one mile away from home to observe, photograph, feed wildlife, a portion of whom might therefore be persuaded to purchase a wildlife viewing product in western Canada. In 1986, 8.71 million nonresident visitor days were spent in British Columbia. Visitors from elsewhere in Canada comprised 40.3%, American visitors comprised 53.6%, and overseas visitors comprised 6% (Min. of Tourism, Recreation and Culture, 1987).

Nineteen and one half percent of Canadians (Filion *et al.*, 1983) and 16% of Americans (United States F&W Service, 1987) directly participate in wildlife viewing away from home. Although it is probably conservative, we assume that these participation rates apply to those who visit British Columbia. Figures are not available on the extent to which overseas citizens participate in wildlife viewing.

Visitors from elsewhere in Canada stayed an average of 6.8 days and spent $35.85 per day, or $243.78 per trip. United States visitors stayed an average of 4.2 days and spent $42.56 per day, or $178.75 per trip. Overseas visitors stayed for 10 days and spent $46.48 per day, or $464.80 per trip (Min. of Tourism, Recreation and Culture, 1987).

Thus, the immediate market size for nonresident primary participation in wildlife viewing is computed as:

Other Canadians	100,000 visitors/yr.	681,000 visitor days
United States citizens	178,000 visitors/yr.	747,000 visitor days
Overseas (6% of total v-d)		91,000 visitor days
Total		1,519,000 visitor days

Expenditures are estimated as follows:

Other Canadians	681,000 v-d @ $35.85	$ 24.4 million/year
United States citizens	747,000 v-d @ $42.56	$ 31.8 million/year
Overseas	91,000 v-d @ $46.48	$ 4.2 million/year
Total		$ 60.4 million

Market Growth Potential . The potential American market for primary wildlife viewing experiences in British Columbia was calculated by first computing a gross demand for touring and outdoors vacations on the Pacific Coast and in the Canadian Rockies using information in Tourism Canada's study of the United States pleasure market (Tourism Canada, 1986b). This computation yields a potential market of 12 million visitor-days. This figure was multiplied by the percentage of Americans involved in wildlife viewing away from home, which is 16% of the population (United States F&W Service, 1987). The result shows a potential market size of 1.92 million American visitor-days. (Appendix E has details of this computation.) This potential is about 2.6 times greater than the estimated present market size.

Data is unavailable regarding the desire of Canadians to visit British Columbia. So we have assumed the percentage is the same as for Americans. With the average Canadian primary participation rate being greater than the United States rate (19.4% compared to 16%), the Canadian market potential for primary participation in the British Columbia wildlife viewing product might also be 2.6 times the present level. This would give a future market size of 1.8 million visitor days.

Useful data presently exists for Japan, West Germany, the United Kingdom, and France regarding preferences to travel to British Columbia (Tourism Canada, 1987). By extrapolating these preferences to the entire overseas market and then cross-tabulating them with participation in adventure, nature and outdoor tours, the overseas market can be estimated. This calculation shows the potential market size to be 650,000 visitor days.

This result is seven times the estimated size of the present primary participation market, which seems incredible. But it reflects how little of the overseas markets British Columbia now captures compared to the potential. The challenge is attracting this market with wildlife viewing products.

The *total* size of the future nonresident primary participation market is huge, roughly in the magnitude of *4.37 million visitor-days per year.*

Much of this potential growth in market size would be comprised of committed adventurers and expert adventurers, who demand high quality guided expeditions in the midcountry and backcountry zones, and are willing to pay for them. To attract this market, British Columbia must not only inform potential visitors, but must deliver the expected levels of resource and service quality.

The Nonresident, Secondary Participant

Immediate Market Size. This market was estimated using a method similar to that used above.

Present participation by origin was estimated using Tourism British Columbia data on 1986 visitation, national participation rates in Canada (43.9%; Filion *et al.*, 1983) and the United States (49%; United States F&W Service, 1987), and then pro-rating a percentage for overseas visitors. The result are given here:

Other Canadians	226,700 visitors	1.54 million v-d
United States citizens	545,000 visitors	2.29 million v-d
Overseas citizens	24,000 visitors	.24 million v-d
Total Estimate	795,700 visitors	4.07 million v-d

Since wildlife viewing is incidental to related activities, present participation figures in related activities are assumed to represent the present size of this market segment.

Wildlife-related expenditures cannot be extrapolated from the available data, but they are believed to be relatively minor compared to other market segments. The significance of this segment is its magnitude and its inclination to visit frontcountry wildlife viewing sites. If such visitors are pleased by what they see, they may return for additional visits and they are likely to encourage their friends to visit as well.

Market Growth Potential . The potential to expand the size of this market segment is difficult to estimate, but there are indications that the growth potential could be significant. For instance, 49% of the projected United States market total visitor-days to British Columbia (Appendix E), or about 1.4 million potential visitors, could be involved in viewing wildlife as a secondary feature (about 2.5 times the present size of market). Similarly, an estimated 300,000 potential overseas visitors (Appendix F) could also enjoy viewing wildlife as part of a touring or general outdoor vacation. If the Canadian market is similar to the United States market then the potential for growth might be 2.5 times present levels, or perhaps 500,000 people. In total then, there might be a future market size of *2.2 million nonresidents* who could participate in wildlife viewing as a secondary activity while visiting British Columbia.

It requires emphasizing that the people comprising this market segment tend not to be motivated to visit British Columbia to view wildlife. Rather they tend to visit areas that have plenty of "things to do and see" and "beautiful scenery" (Tourism Canada, 1986b). Well distributed and good quality frontcountry wildlife viewing opportunities can contribute importantly to satisfying such visitors once they are here.

Appendix E

Estimated Potential U.S. Markets

ESTIMATED POTENTIAL UNITED STATES MARKET FOR WILDLIFE VIEWING IN BRITISH COLUMBIA

The following information is derived from Tourism Canada's study *U.S. Pleasure Travel Market, Canadian Potential: Highlights Report.*

Canada's share of the U.S. pleasure travel market (Tourism Canada, 1986b):

Trip type	Number of Trips/Yr.	Av. Length
Outdoors	1.6 million	6.3 days
Touring	2.3 million	8.1 days

Potential "touring" trips to British Columbia, based upon preferences for "Pacific Coast" and "Canadian Rockies" (Tourism Canada, 1986b):

Pacific Coast pref.: 35% x 2.3 mill. = 805,000
Cdn. Rockies pref.: 15% x 2.3 mill. = 345,000
Total Potential: 1,150,000 trips/yr.

Potential "outdoors" trips to B.C., based upon preferences for "Pacific Coast" and "Canadian Rockies" (Tourism Canada, 1986b).

Pacific Coast pref.: 25% x 1.6 mill. = 400,000
Cdn. Rockies pref.: 26% x 1.6 mill. = 416,000
Total Potential: 816,000 trips/yr.

Potential visitor-days for combined "touring" and "outdoors" markets:

Touring 8.1 days/trip x 1.15 mill.trips = 9.3 mill. v-d
Outdoors 6.3 days/trip x 816,000 trips = 2.6 mill. v-d
Total Potential: about 12 million

United States rate of primary participation in wildlife viewing activities away from home: 16% of population (U.S. F&W Service, 1987). Therefore it is concluded that this proportion of the potential touring and outdoors oriented visitors to B.C. would be primary participants in wildlife viewing.

United States rate of secondary participation in wildlife viewing activities away from home: 49% of population (U.S. F&W Service, 1987). It is assumed that a similar percentage of potential U.S. visitors to B.C. would also be inclined to secondary participation in wildlife viewing.

Appendix F

Calculation of Overseas Market

CALCULATION OF OVERSEAS MARKETS

1. Data derived from Tourism Canada's *Pleasure Travel Markets to North America: Highlights Report.*

Origin Country	Number of Travellers	% Pref. Canada	% Pref. B.C.	Adventure/Nature* Focus (estimate)	Touring/Outdoor* Focus (est.)
Japan	3.8 mill.	7%	88%	14,809	97,486
W.Ger'y	4.3 mill.	12%	28%	5,086	8,669
U.K.	2.0 mill.	10%	45%	8,284	27,220
				28,179	133,375

* These figures have been derived by cross-tabulating the percentages of market interest in general categories of experience such as nature, adventure, outdoors, etc. with the preferences for Canada and, within Canada, for British Columbia.

2. Projection of "1" to the total Overseas market, based upon the Ministry of Tourism, Recreation and Culture's data regarding overseas visitation.

   a) Japan, West Germany, and the United Kingdom together contribute 43.4% of visitor days to the overseas total visitor days in British Columbia.

   b) The average Overseas visitor stays 10 days.

   c) Therefore the total potential overseas market for an adventure/nature focused vacation in British Columbia is:

   $$\frac{28{,}179 \times 10 \text{ days}}{.434} = 650{,}000 \text{ visitor-days}$$

   It is assumed by the authors that the combination of interest in nature and adventure probably reflects a strong orientation to directly participate in wildlife viewing.

   d) The total potential overseas market for indirect participation in wildlife viewing is based upon calculation of overseas interest in touring and the outdoors:

   $$\frac{133{,}375}{.434} = 307{,}316 \text{ potential visitors}$$

Appendix G

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